USER MANUAL

THE LULU

(Version 0.1)

ORIGINE IT SDN BHD

DEC 2010

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1.0 SIGN UP

Description: Sign-up is only applicable for person in-charge (admin) for the first time using of the system.

Step:

1. Open browser.
2. Search for “thelulu.com”, you will see Figure 1.
3. You can click on “Try It Now! Free” to sign it up free.

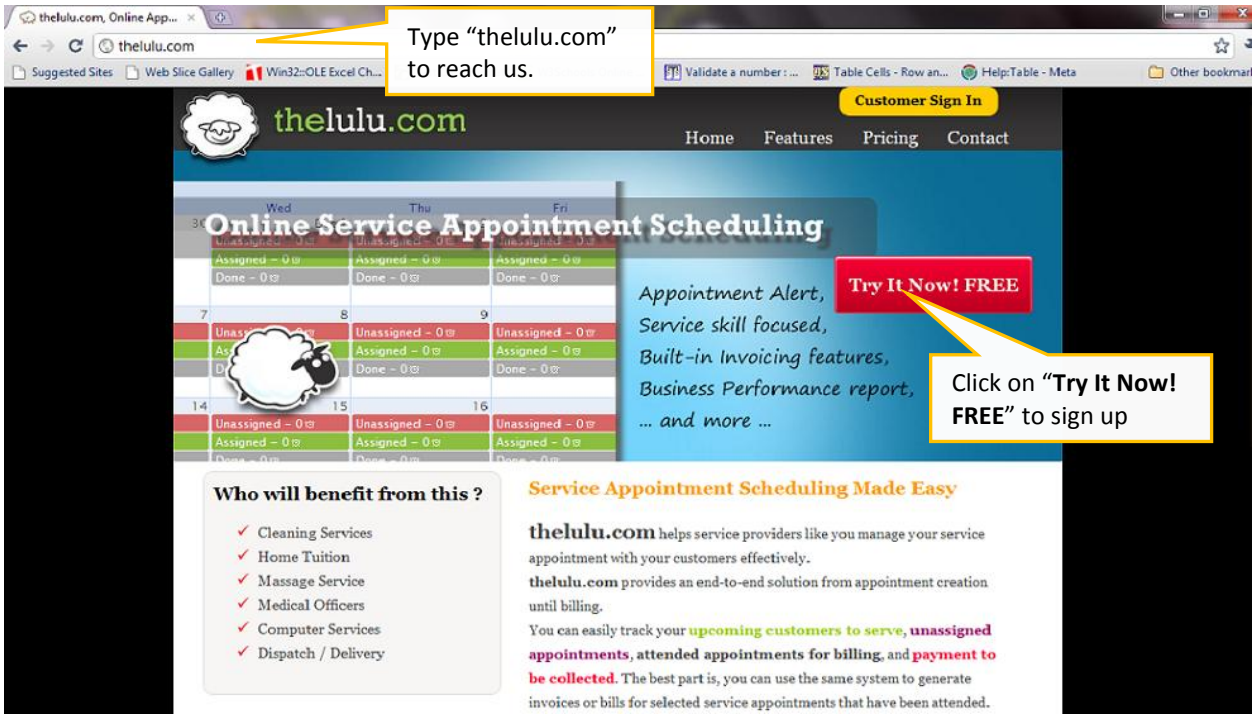
Type “thelulu.com” to reach us.
thelulu.com
Customer Sign In
Home
Features
Pricing
Contact
Online Service Appointment Scheduling
Try It Now! FREE
Appointment Alert,
Service skill focused,
Built-in Invoicing features,
Business Performance report,
... and more ...
Click on “Try It Now! FREE” to sign up
Who will benefit from this ?
Cleaning Services
Home Tuition
Massage Service
Medical Officers
Computer Services
Dispatch / Delivery
Service Appointment Scheduling Made Easy
thelulu.com helps service providers like you manage your service appointment with your customers effectively.
thelulu.com provides an end-to-end solution from appointment creation until billing.
You can easily track your upcoming customers to serve, unassigned appointments, attended appointments for billing, and payment to be collected. The best part is, you can use the same system to generate invoices or bills for selected service appointments that have been attended.

Figure 1: Landing Page

4. After clicking “Login”, you can click “Here” to sign up, refer to Figure 2.

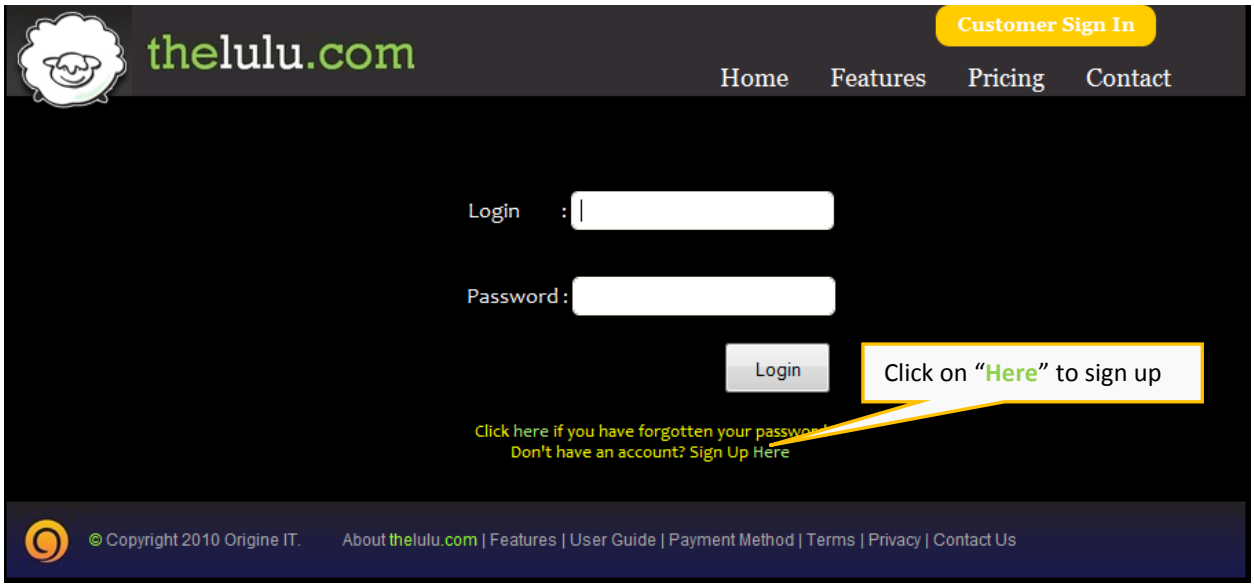
thelulu.com
Customer Sign In
Home
Features
Pricing
Contact
Login :
Password :
Login
Click on “Here” to sign up
Click here if you have forgotten your password
Don't have an account? Sign Up Here
© Copyright 2010 Origine IT.
About thelulu.com | Features | User Guide | Payment Method | Terms | Privacy | Contact Us

Figure 2: Login or Sign-Up Page

5. Enter your name, email address and name of company as well as select the package u want to sign up, then, click “Sign Up” button, refer to Figure 3.

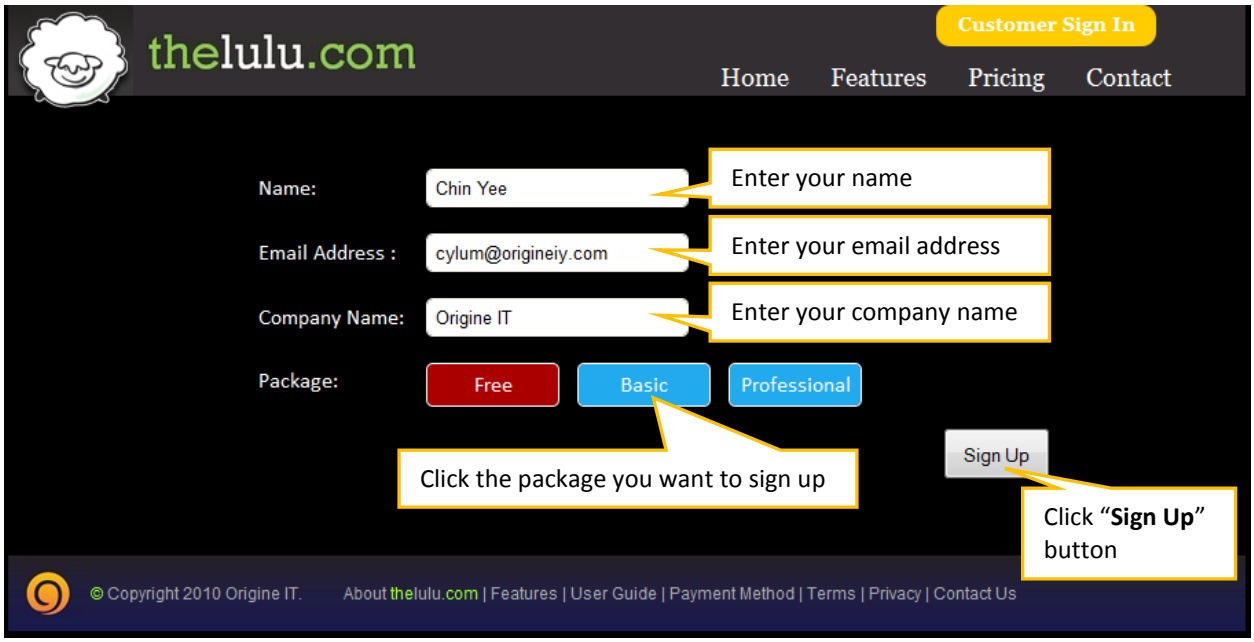

Figure 3: Sign Up Page

6. If you successfully sign-up, a pop-up box will appear and prompt you to check your email and get the password to login refer to Figure 4.

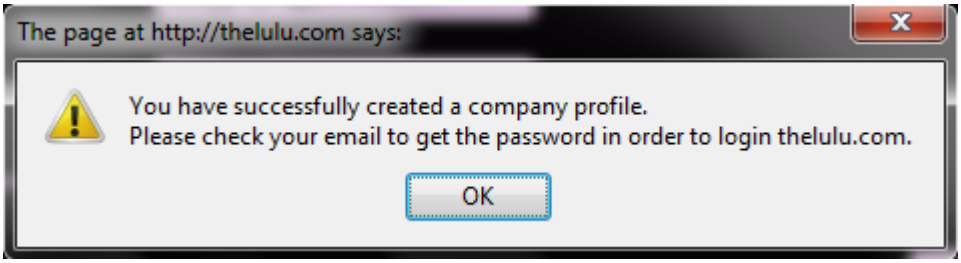
The page at http://thelulu.com says:
You have successfully created a company profile.
Please check your email to get the password in order to login thelulu.com.
OK

Figure 4: Pop-Up Box when Sign Up Successfully

7. Go to your mailbox and get the password from the email sent by support@thelulu.com, refer to Figure 5.

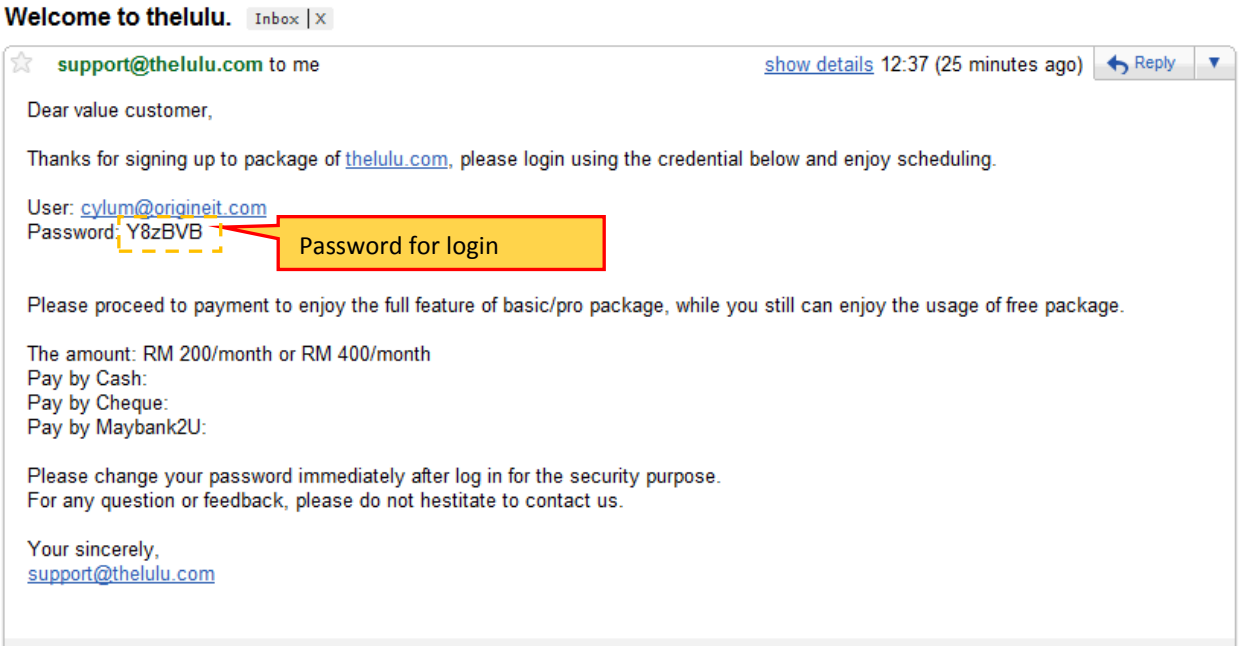
Welcome to thelulu.
Inbox | X
support@thelulu.com to me
show details 12:37 (25 minutes ago)
Reply
Dear value customer,
Thanks for signing up to package of thelulu.com, please login using the credential below and enjoy scheduling.
User: cylum@origineit.com
Password: Y8zBVB
Password for login
Please proceed to payment to enjoy the full feature of basic/pro package, while you still can enjoy the usage of free package.
The amount: RM 200/month or RM 400/month
Pay by Cash:
Pay by Cheque:
Pay by Maybank2U:
Please change your password immediately after log in for the security purpose.
For any question or feedback, please do not hestitate to contact us.
Your sincerely,
support@thelulu.com

Figure 5: Email which Contains Password

2.0 LOGIN

Description: Login to use the service.

Step:

1. Click the "**Login**" bar, refer to Figure 6.

Figure 6: Login Bar

2. Enter email address and given password in email which is sent by support@thelulu.com, then, click "**Login**" button, refer to Figure 7.

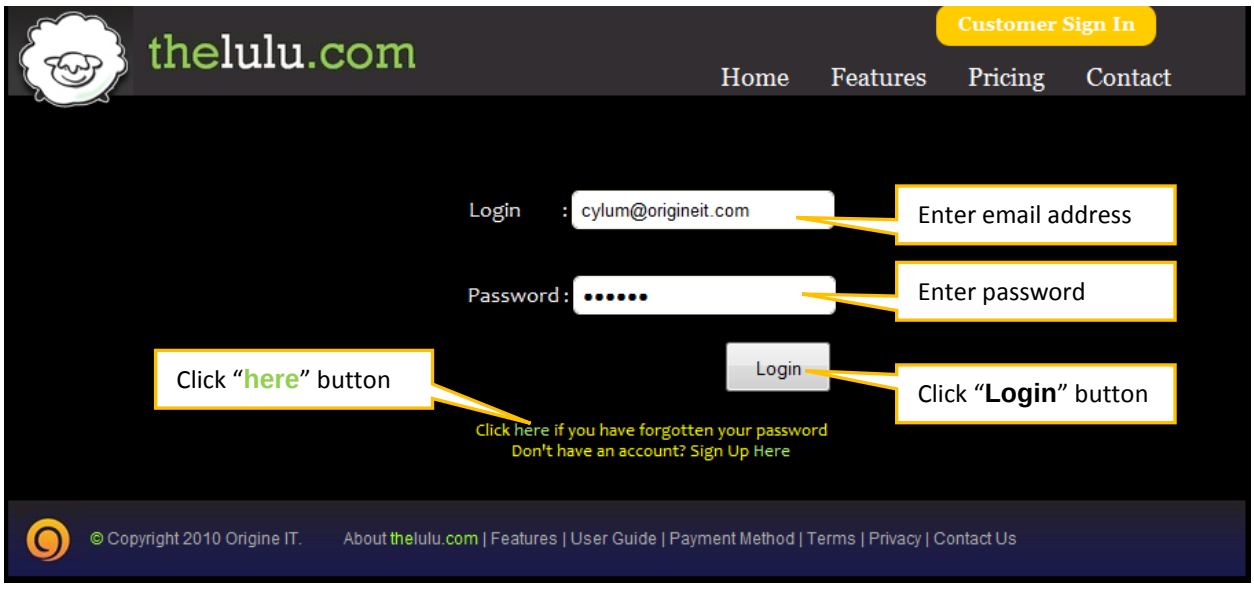

Figure 7: Login Page

3.0 RESET PASSWORD

Description: If you have forgotten your password for login.

Step:

1. Click "**here**" at the login page which is below the "**Login**" button, refer to Figure 4. You will see Figure 7.
2. Enter email address, then, click "**Reset Password**", refer to Figure 8.

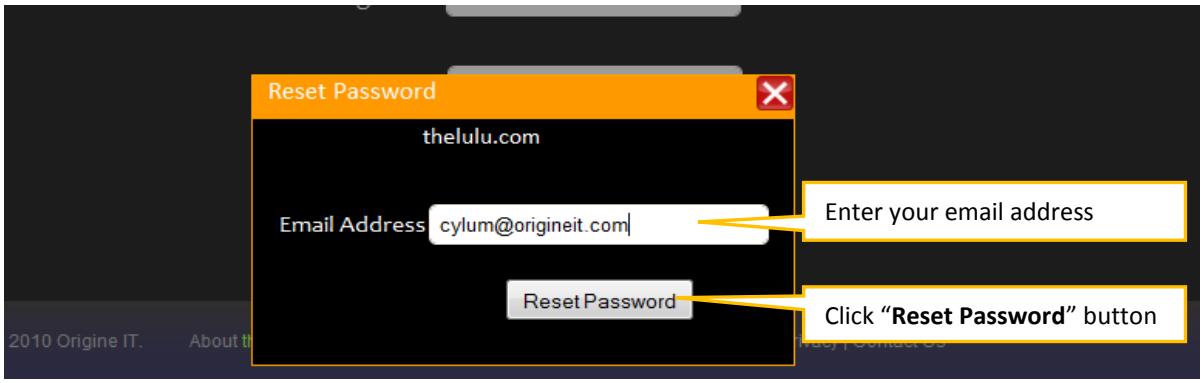

Figure 8: Reset Password

3. An email will be sent to the given email address. Check the password in the email for login, refer to Figure 5.

4.0 HOME

Description: It will show the appointments' summary of the 7 days and appointment's details on that day automatically.

Step:

1. After login, you will come to Home page, refer to Figure 9a.
2. If you want to go Home page from other page, click "**Home**" tab, refer to Figure 9b.
3. Select and click on the date you want to show the appointment details, refer to Figure 9b.

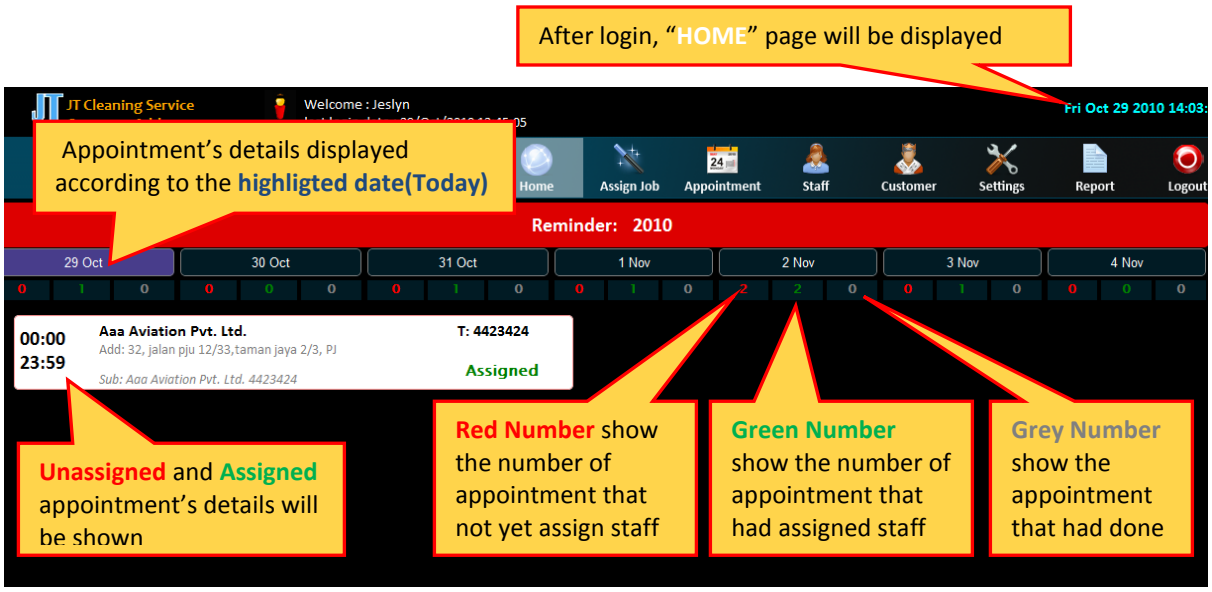

Figure 9a: Home Page

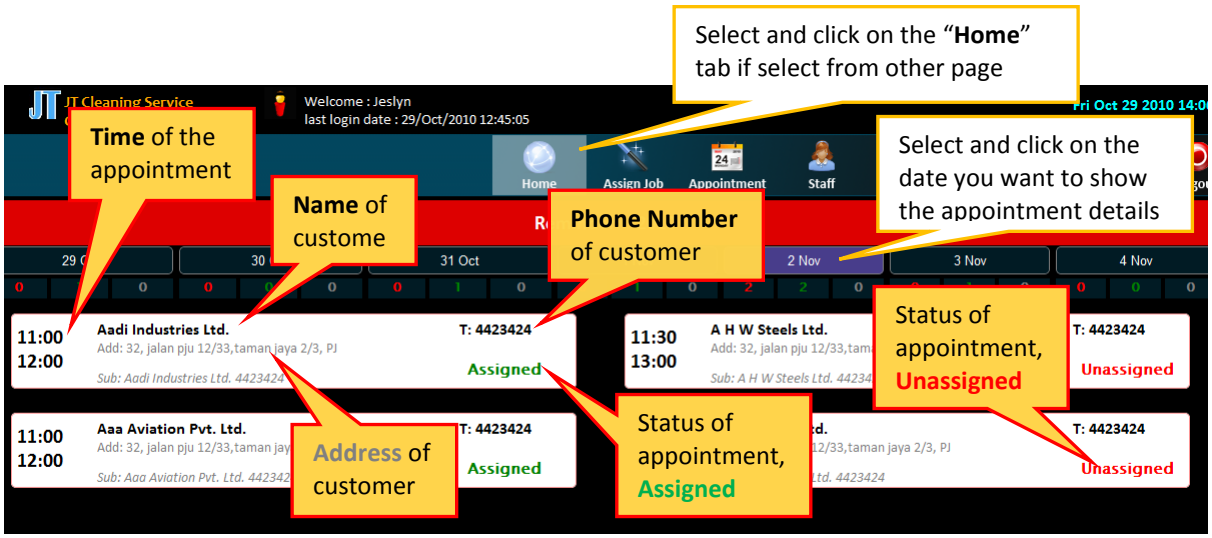

Figure 9b: Home Page

5.0 CREATE NEW APPOINTMENT AND ASSIGN JOB

Description: Create appointment and assign job to staff.

Step:

1. Click "**Assign Job**" tab, you will see Figure 10.

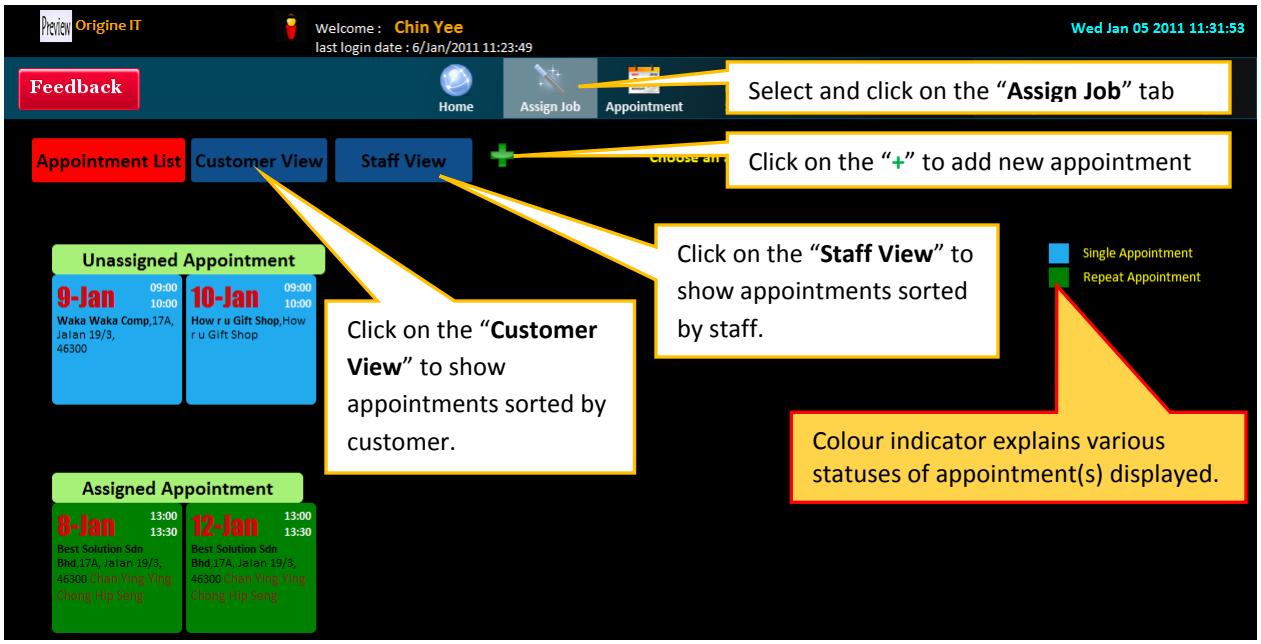
Origine IT
Welcome : Chin Yee
last login date : 6/Jan/2011 11:23:49
Wed Jan 05 2011 11:31:53
Feedback
Home
Assign Job
Appointment
Select and click on the "Assign Job" tab
Appointment List
Customer View
Staff View
Click on the "+" to add new appointment
Click on the "Staff View" to show appointments sorted by staff.
Single Appointment
Repeat Appointment
Unassigned Appointment
9-Jan
10-Jan
Waka Waka Comp,17A, Jalan 19/3, 46300
How r u Gift Shop,How r u Gift Shop
Click on the "Customer View" to show appointments sorted by customer.
Colour indicator explains various statuses of appointment(s) displayed.
Assigned Appointment
8-Jan
12-Jan
Best Solution Sdn Bhd,17A, Jalan 19/3, 46300

Figure 10: Assign Job Page

2. You can click "**Customer View**" button to view the appointments sorted by customers' names, refer to Figure 11a.
3. You can click "**Staff View**" button to view the appointments sorted by staffs' names, refer to Figure 11b.
4. Click on the "**+**" to add new appointment, you will see Figure 10.
5. Enter appointment details, refer to Figure 10a – Figure 10e.

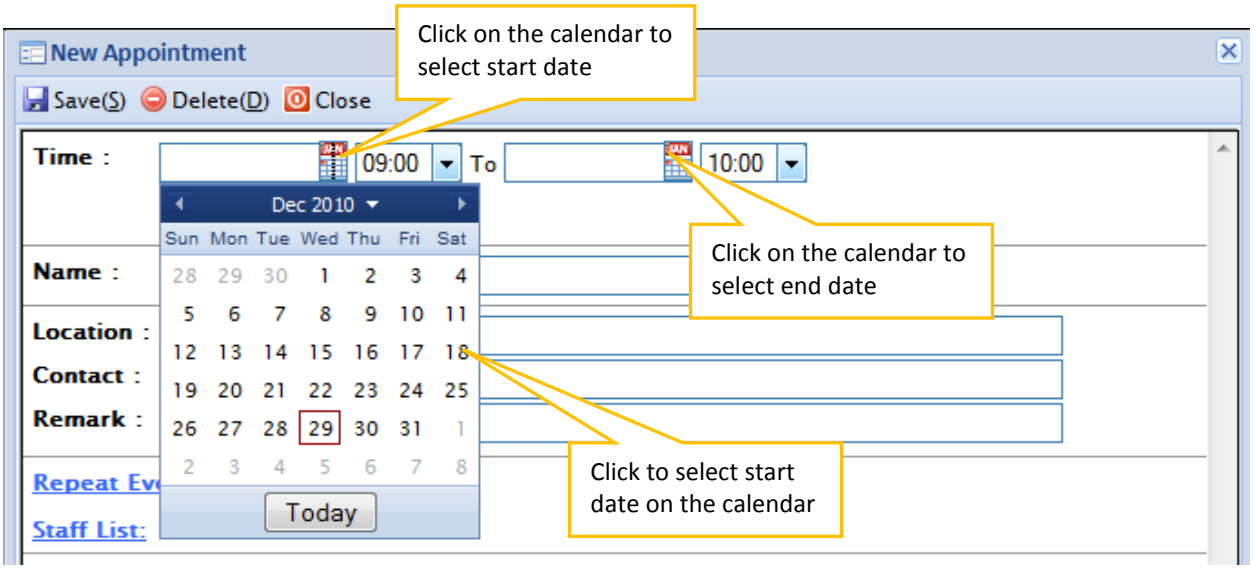

Figure 10a: New Appointment

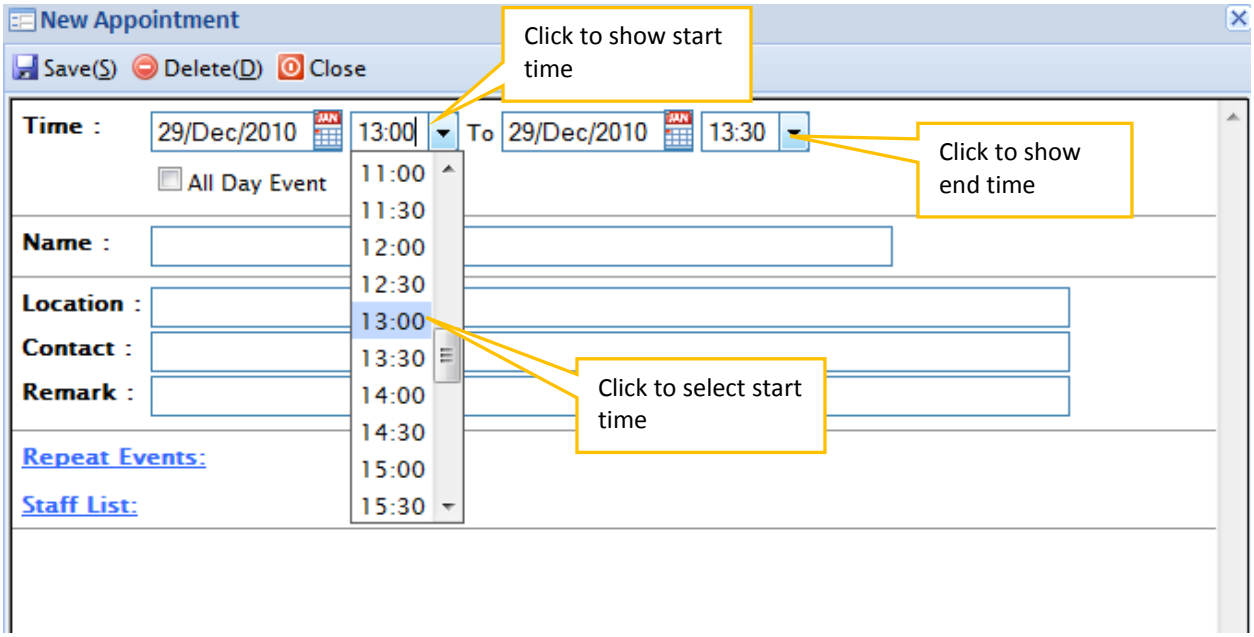

Figure 10b: New Appointment

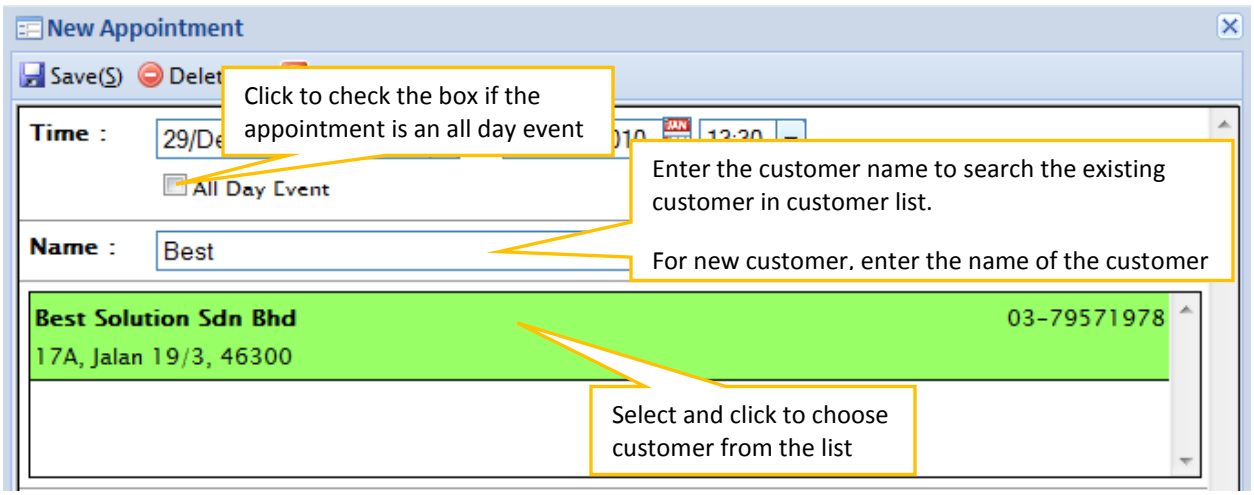
New Appointment
Save(S)
Delet
Time :
29/De
All Day Event
Name :
Best
Best Solution Sdn Bhd
03-79571978
17A, Jalan 19/3, 46300
Click to check the box if the appointment is an all day event
Enter the customer name to search the existing customer in customer list.
For new customer, enter the name of the customer
Select and click to choose customer from the list

Figure 10c: New Appointment

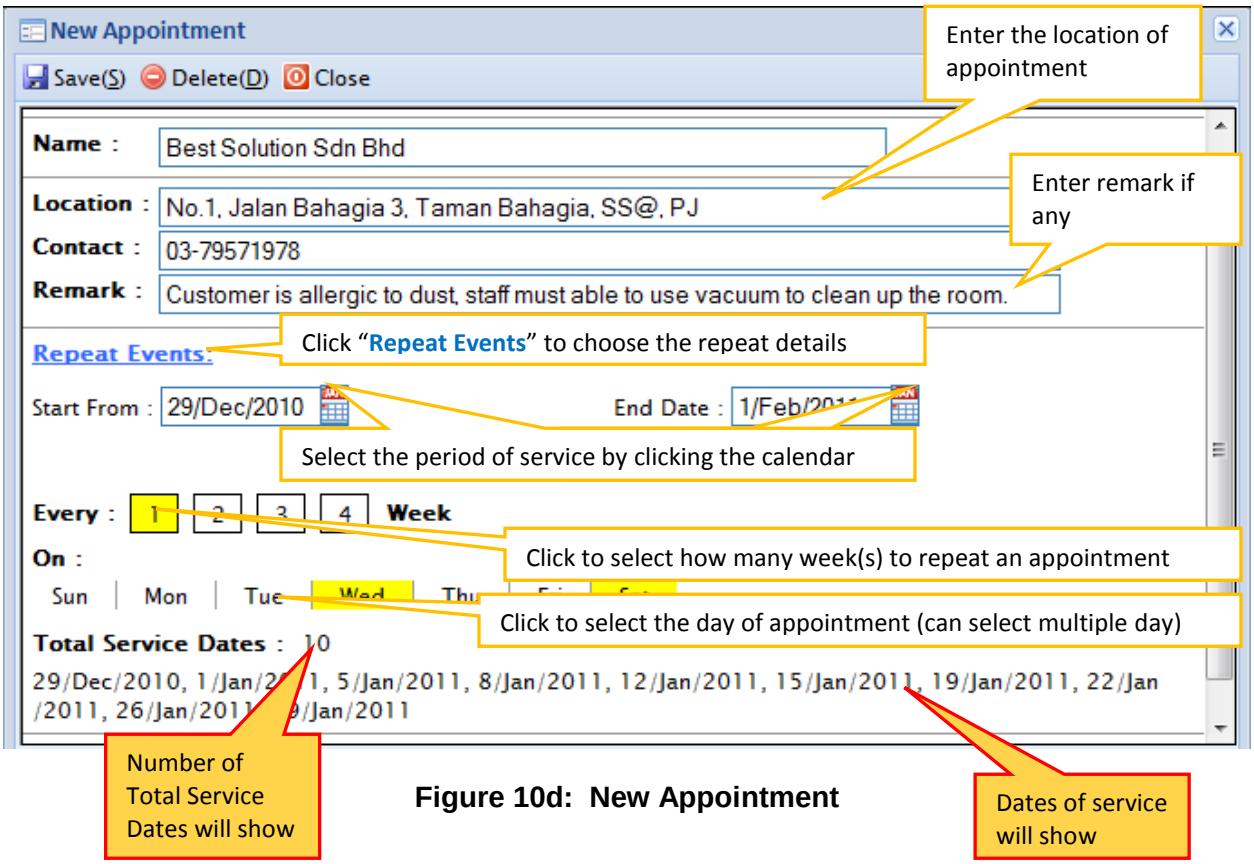

Figure 10d: New Appointment

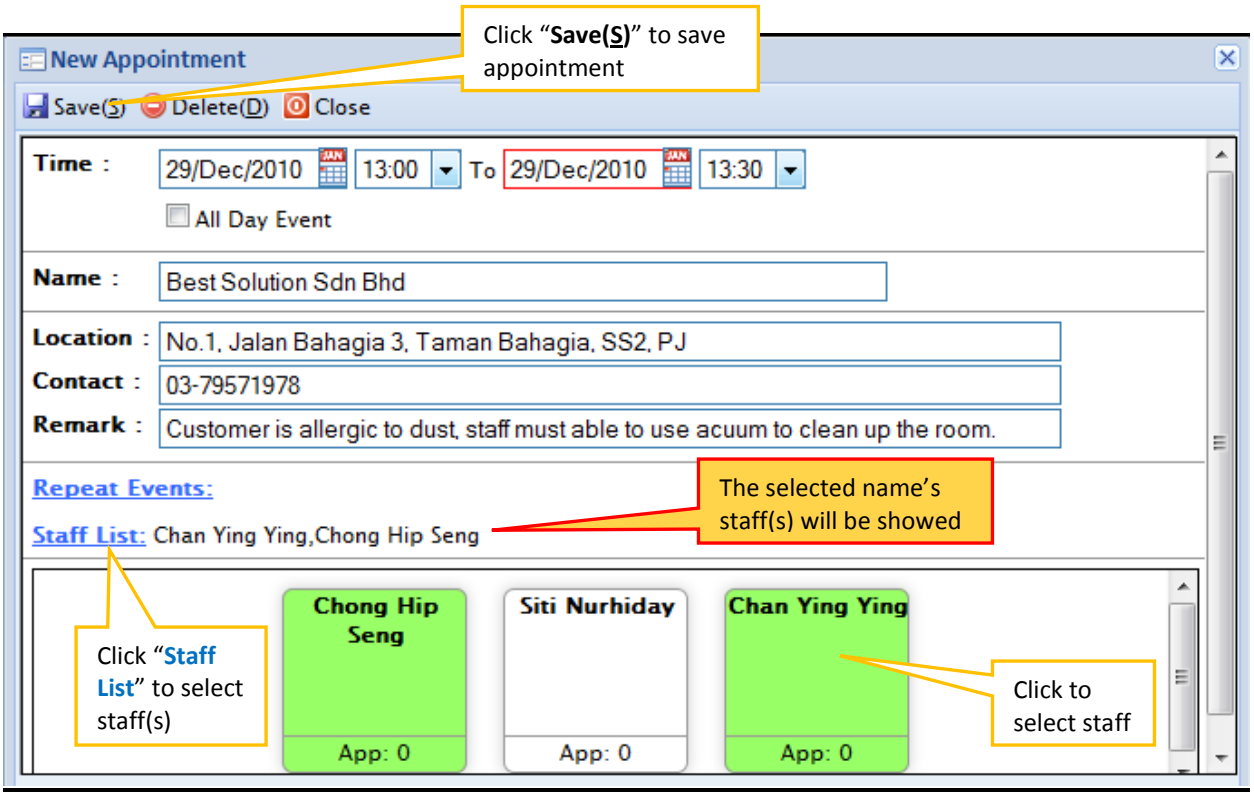

Figure 10e: New Appointment

6. Enter the start date and end date at the "Choose an appointment date" and click "OK" button to list all the appointments during the specified period, refer to Figure 10f.

7. Click to select the Unassigned Appointment to assign staff for the appointment, refer to Figure 10f.

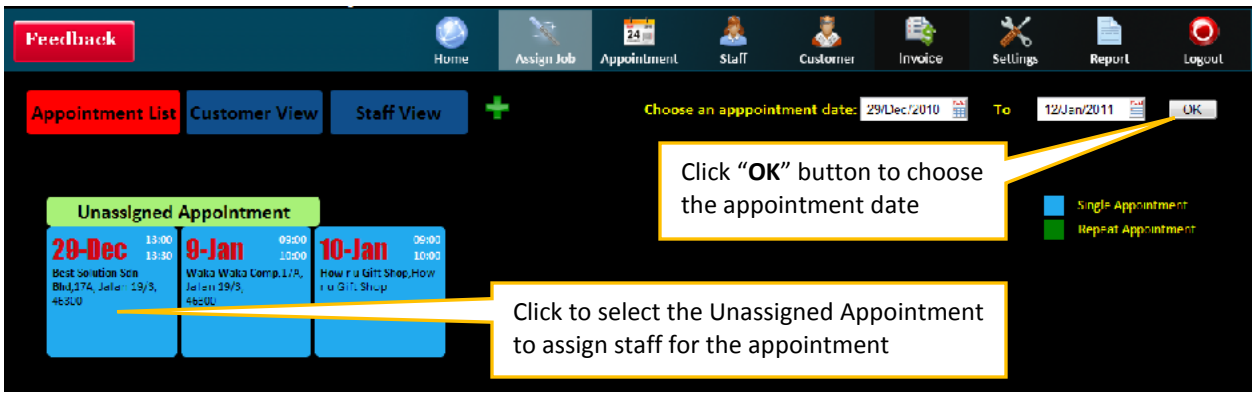

Figure 10f: New Appointment

8. You can add appointment(s) by clicking the "**+**" in "**Customer View**" and "**Staff View**", refer to Figure 11a and Figure 11b respectively.

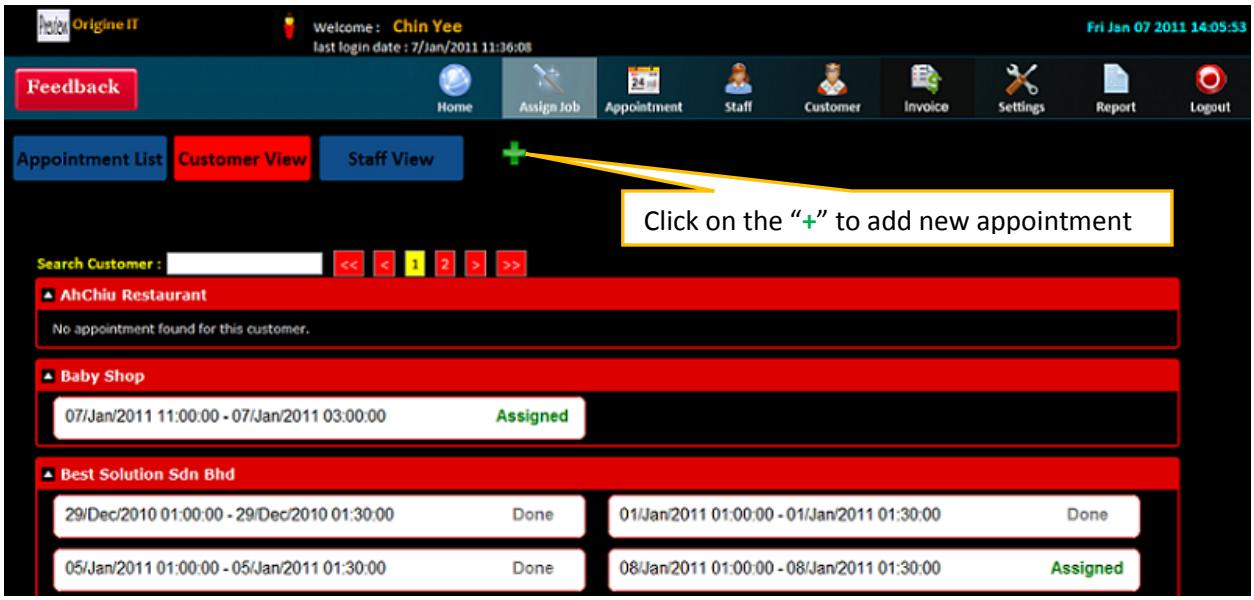

Figure 11a: Customer View for Appointments

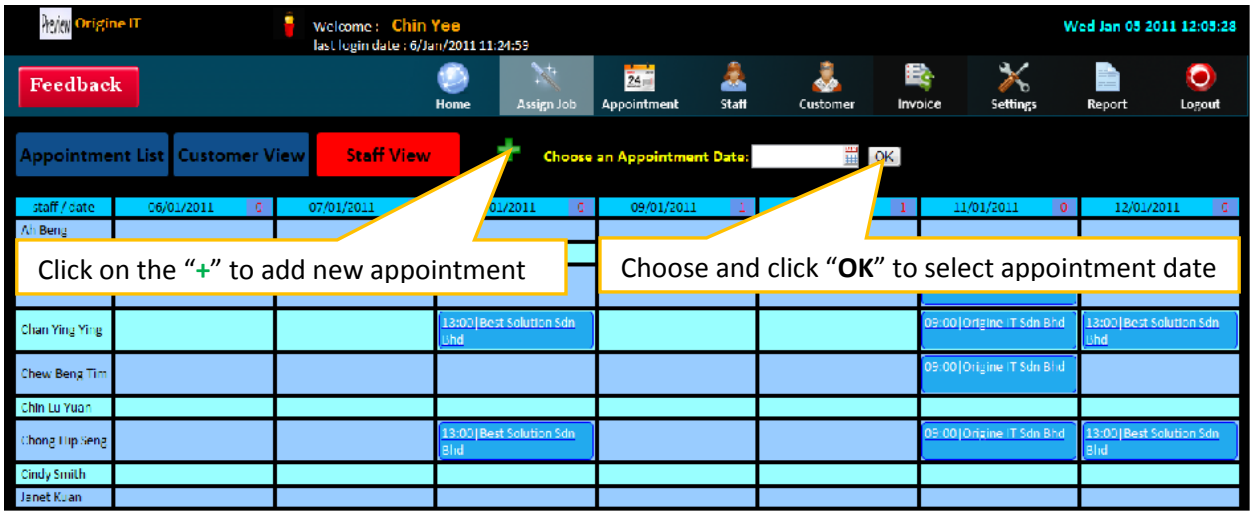

Figure 11b: Staff View for Appointments

6.0 DISPLAY ALL APPOINTMENTS

Description: Display all the appointments (unassigned, assigned, done) of the company.

Step:

1. Click on "**Appointment**" tab. You will see Figure 12.
2. Click on "**<**" and "**>**" button to select previous month and a month later, refer to Figure 12.
3. Click any "**Unassigned**", "**Assigned**" or "**Done**" appointment bar to go to day view of appointment, refer to Figure 12a.

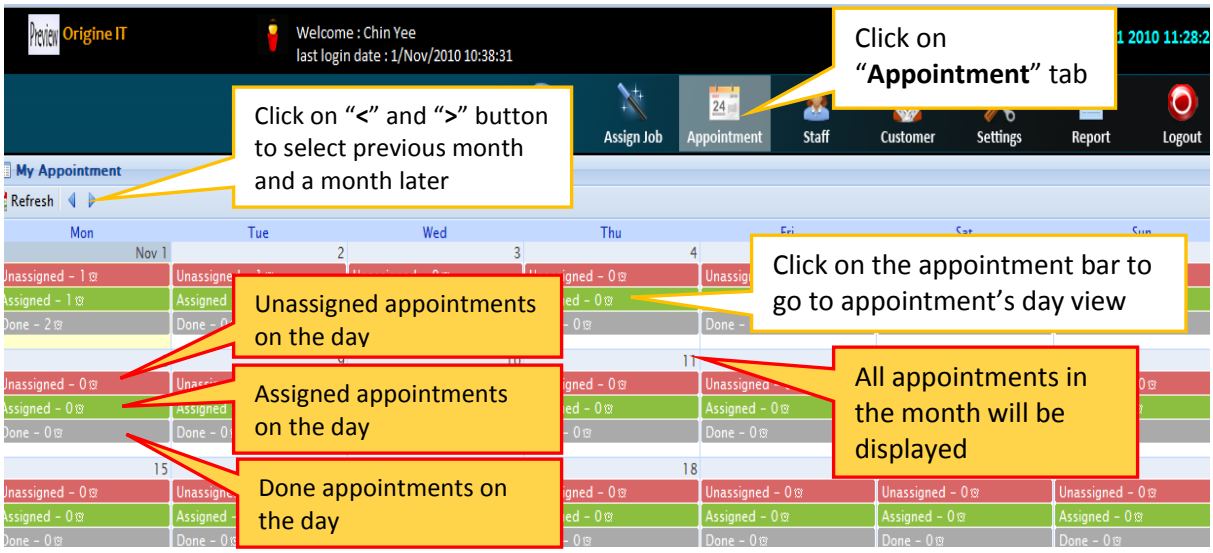

Figure 12: Appointment List

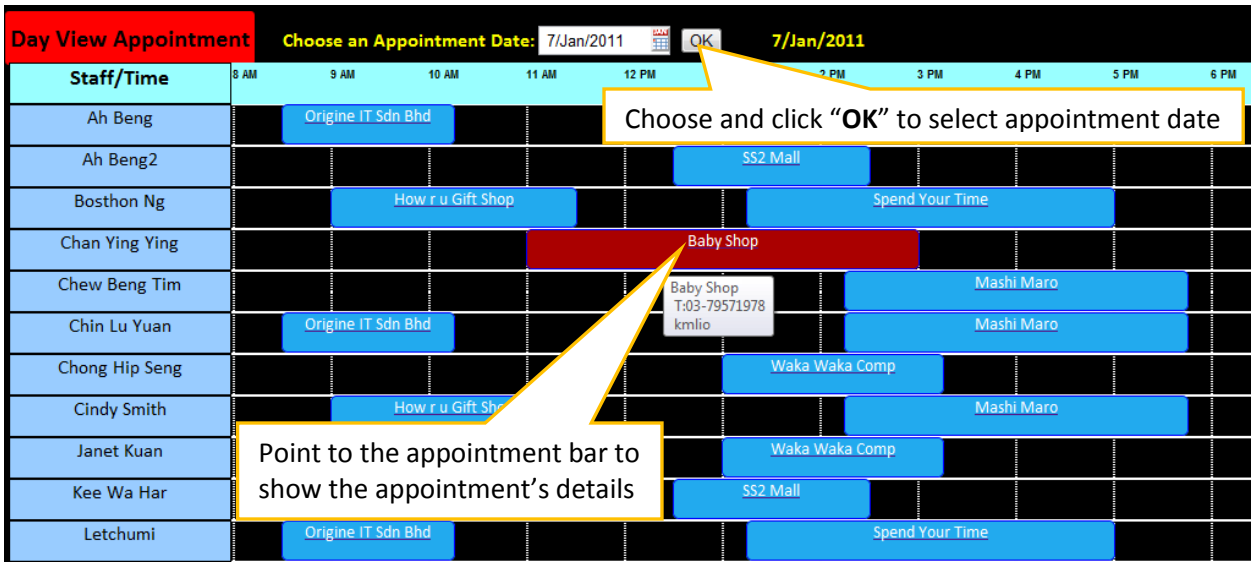

Figure 12a: Day View Appointment

7.0 CREATE NEW STAFF

Description: Create a new staff.

Step:

1. Click on "**Staff**" tab. You will see Figure 13.
2. Click on the "**+**" to add new staff.

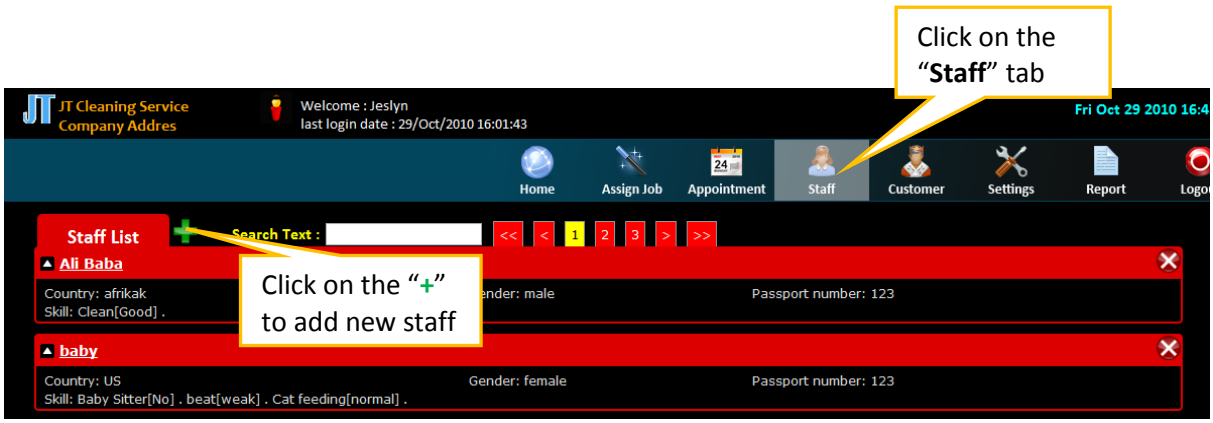

Figure 13: Staff Page

3. Enter staff's details, refer to Figure 14a – Figure 14b.

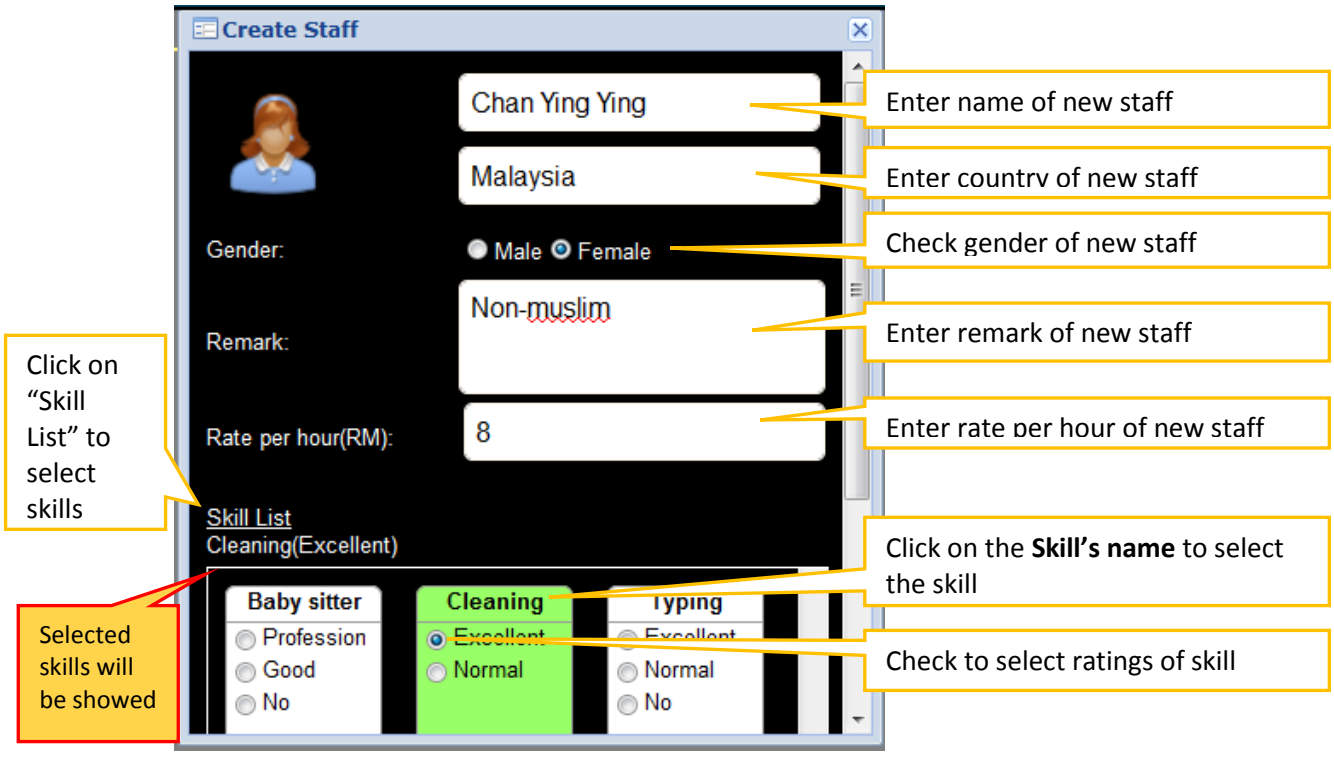

Figure 14a: Create / Edit Staff Page

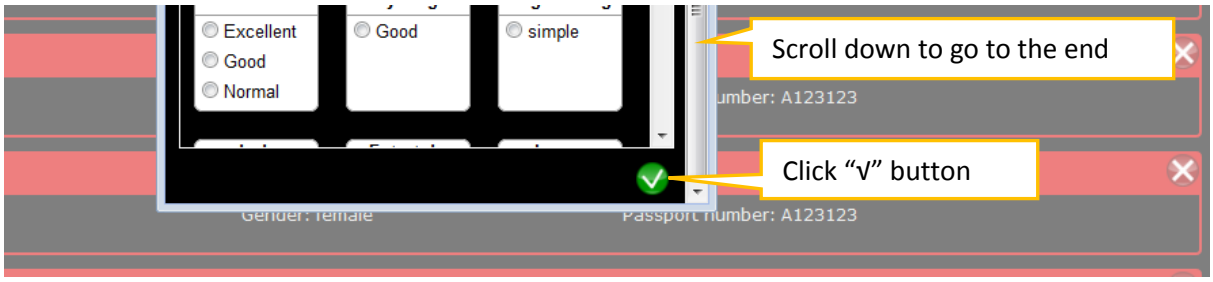

Figure 14b: Create / Edit Staff Page

8.0 CREATE NEW CUSTOMER

Descriptions: Create new customer.

Step:

1. Click on "**Customer**" tab. You will see Figure 15.
2. Click on the "**+**" to add new customer.

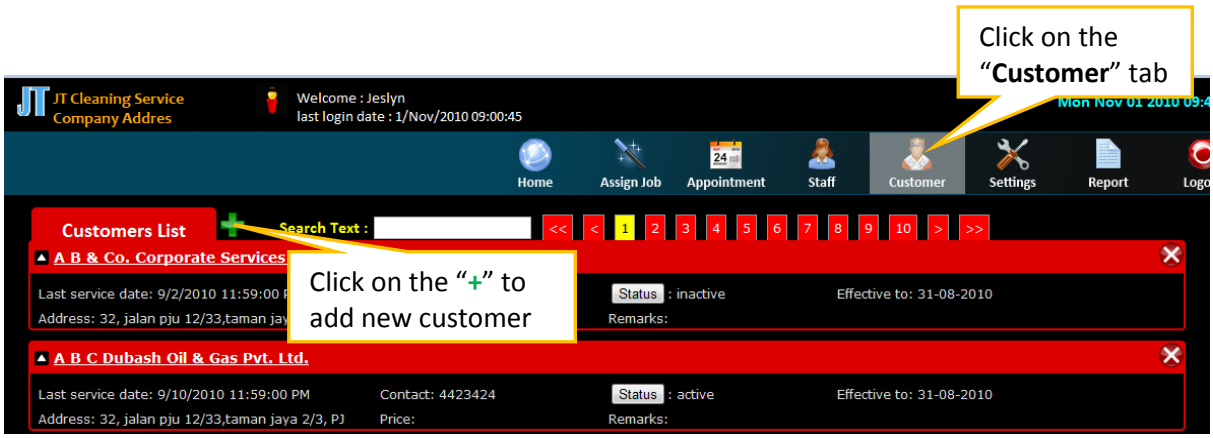

Figure 15: Customer Page

3. Enter customer's details, refer to Figure 16.

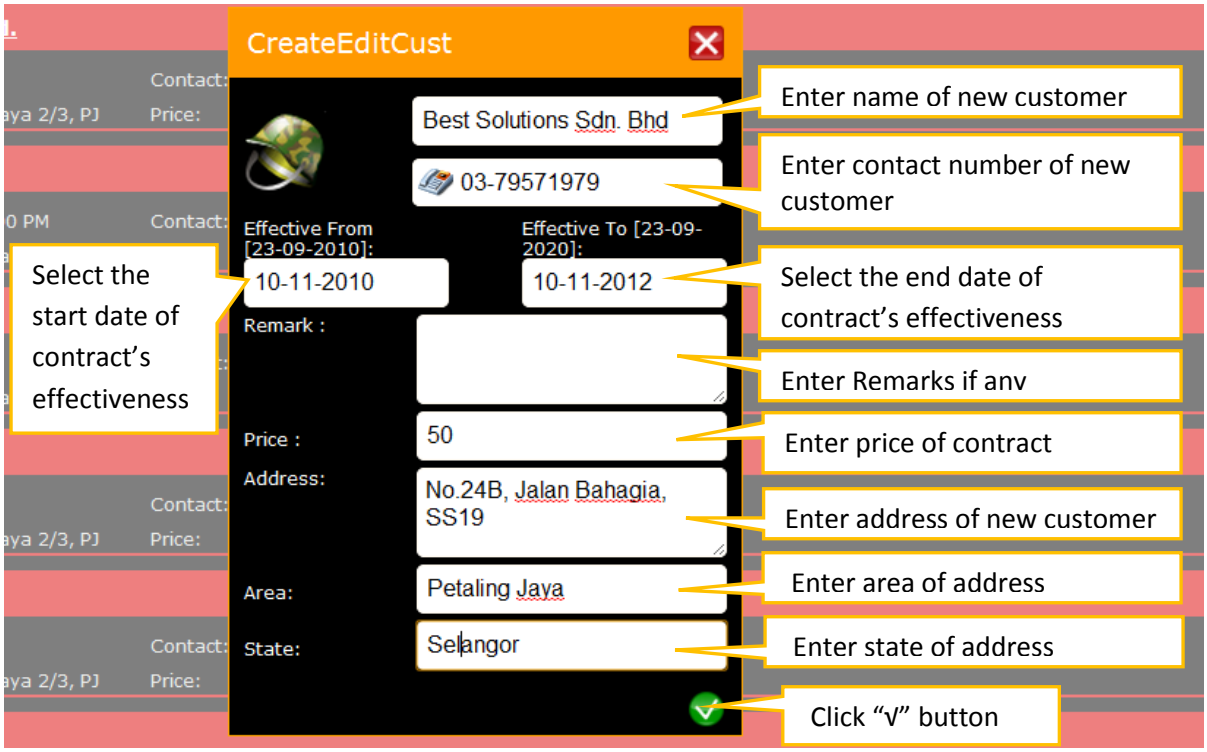

Figure 16: Create / Edit Customer's Details Page

9.0 CREATE NEW USER

Descriptions: Create new user who can access and use this system, such as manager, supervisor, admin.

Step:

1. Click on "**Setting**" tab, refer to Figure 17.
2. Select and click on the "**User**".
3. Click on the "**+**" to add new user, you will see Figure 18.

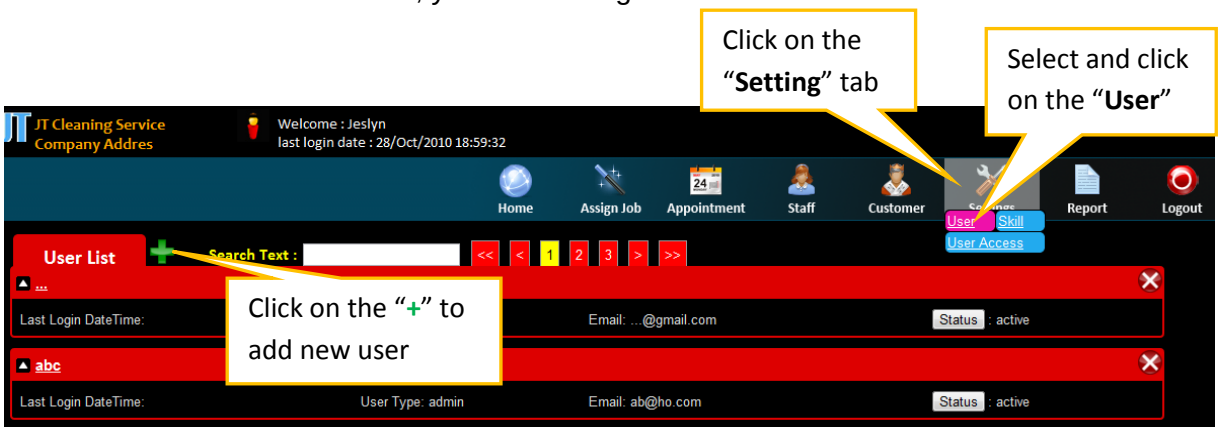

Figure 17: User Page

4. Enter the details of new user, refer to Figure 18.
5. Click "√" button.

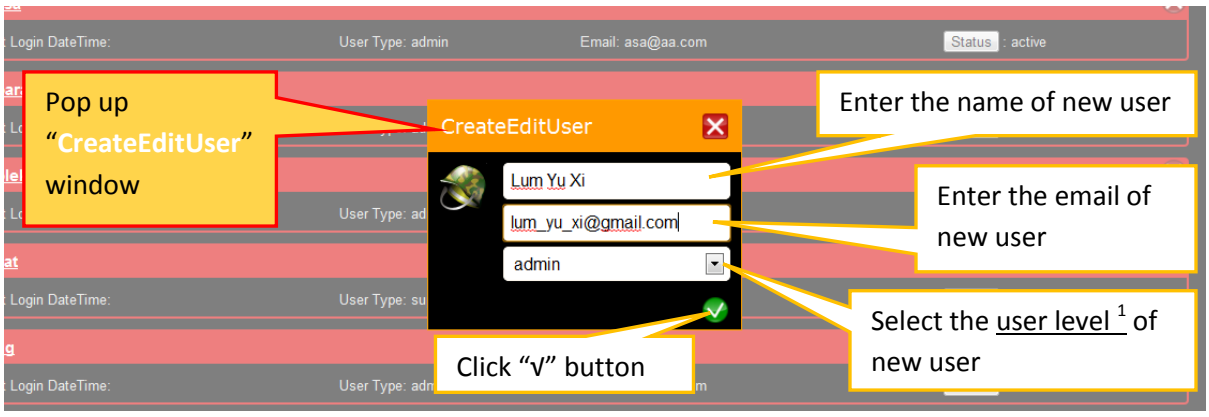

Figure 18: Create / Edit User Page

user level [1] = Different user level has different authorities in using the system. For example, "normal" user can read the appointment but cannot add new user while the "admin" user has all the authority for all activities in this system.

10.0 CREATE NEW SKILL

Description: Create new skill which enable user to assign the newly added skill to staff and give their rating on it.

Step:

1. Click on "**Setting**" tab, refer to Figure 19.
2. Select and click on the "**Skill**".
3. Click on the "**+**" to add new skill, you will see Figure 20.

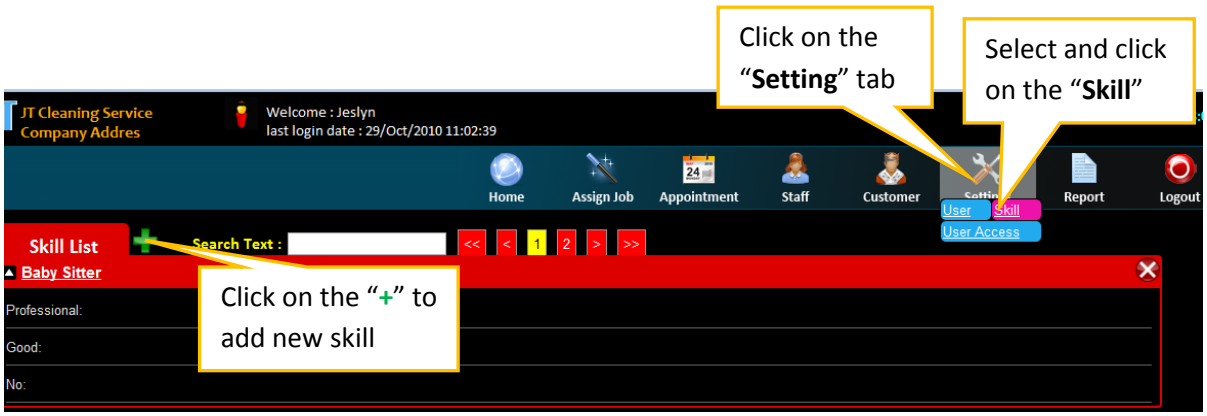

Figure 19: Skill Page

4. Enter the details of new skill, refer to Figure 20. The descriptions of Skill Description and Skill Rating Description can be empty.
5. Click "√" button.

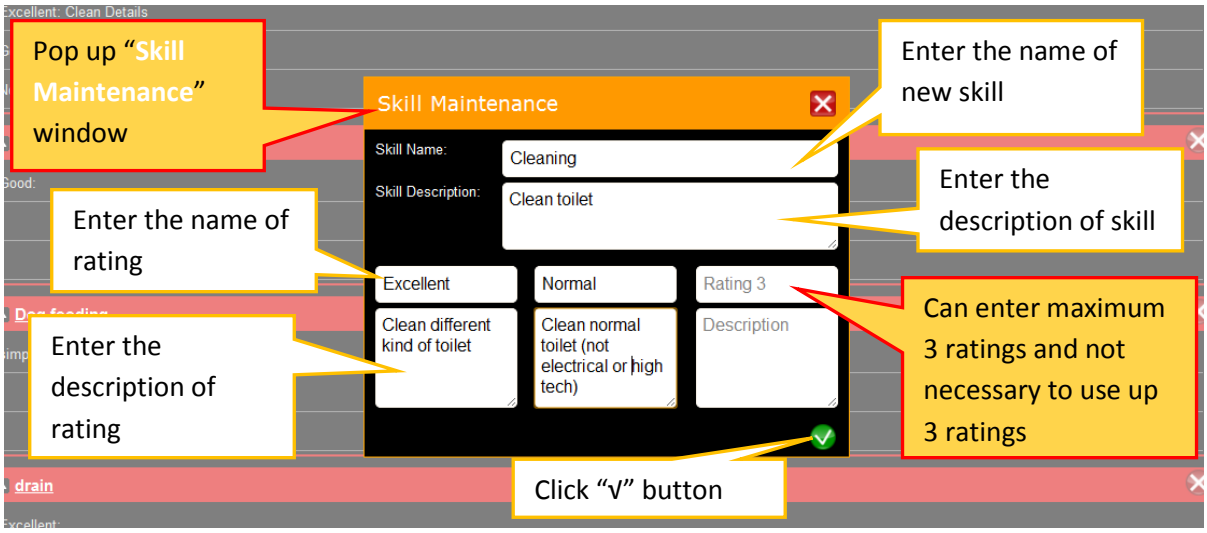

Figure 20: Create / Edit Skill Page

11.0 CHANGE USER ACCESS

Description: Change the access right of different user module.

In this example, customer can only view the information but cannot edit, delete and add the information.

Step:

1. Click on "**Setting**" tab, refer to Figure 21.
2. Select and click on the "**User Access**".
3. Click on the select module that wants to edit.
4. Click on the "√" to change it to "**X**" and vice versa.
5. After click the "√" in the Access Right to change it to "**X**", the customer cannot view the information.

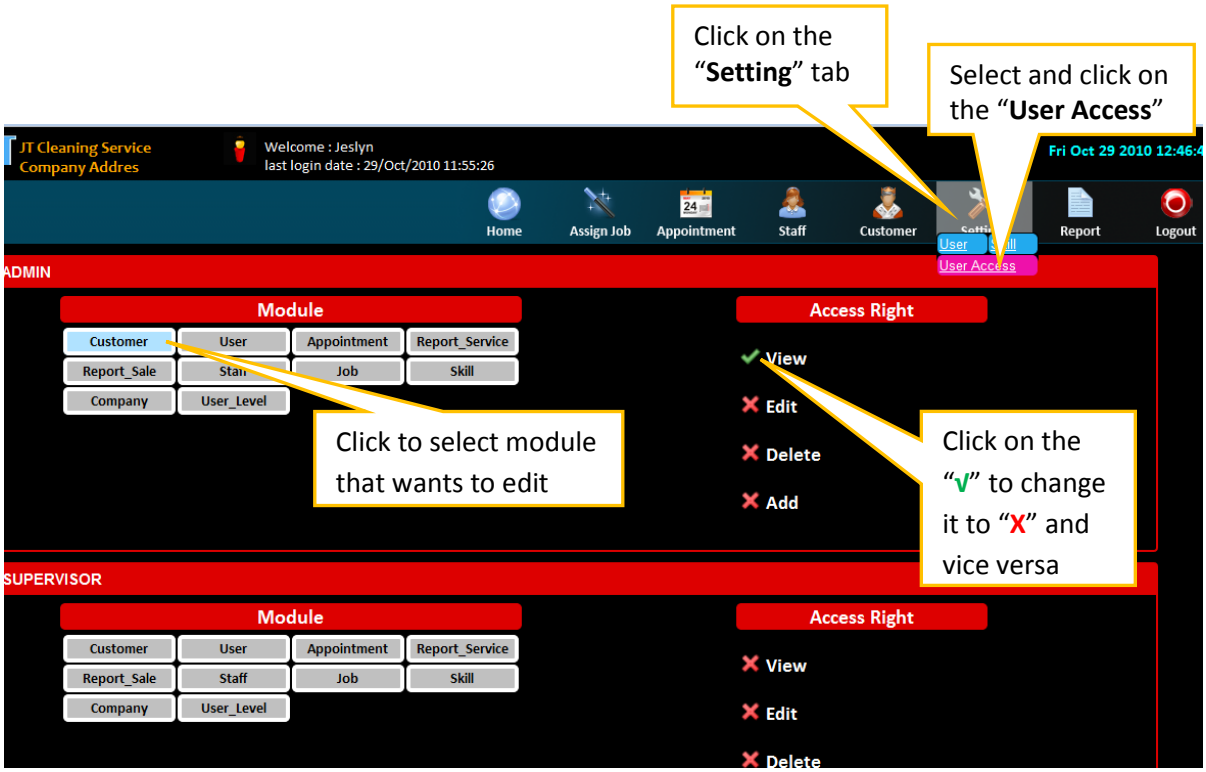

Figure 21: User Access Page

12.0 CREATE INVOICE

Description: Create invoice to customer which can include multiple unpaid bills.

Step:

1. Click on "**Invoice**" tab, the unbilled appointment will be displayed, refer to Figure 22a.
2. Click on "**Unbilled Appointment**" bar that customer want to include in an invoice.
3. Click on "**Create Invoice**" icon.

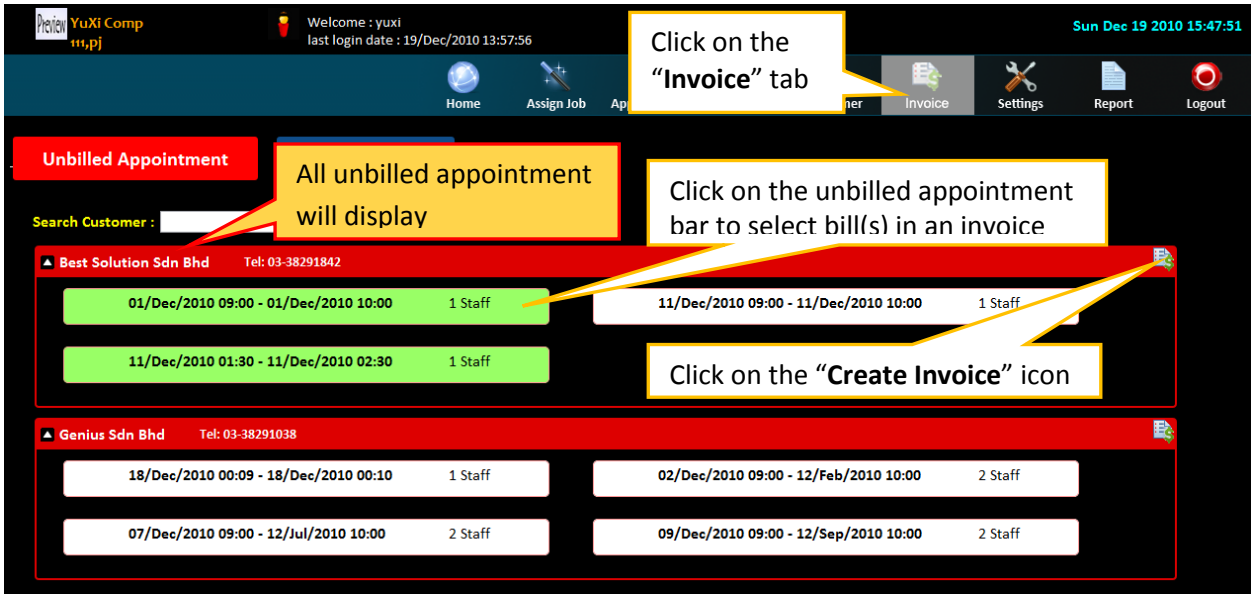

Figure 22a: Unbilled Appointment Page

4. A pop-up window with the details of invoice will be shown, refer to Figure 22b.
5. Enter the days of term, reference number, remark and edit the amount of bills if needed.
6. Click on "**Save**" button to generate the invoice.

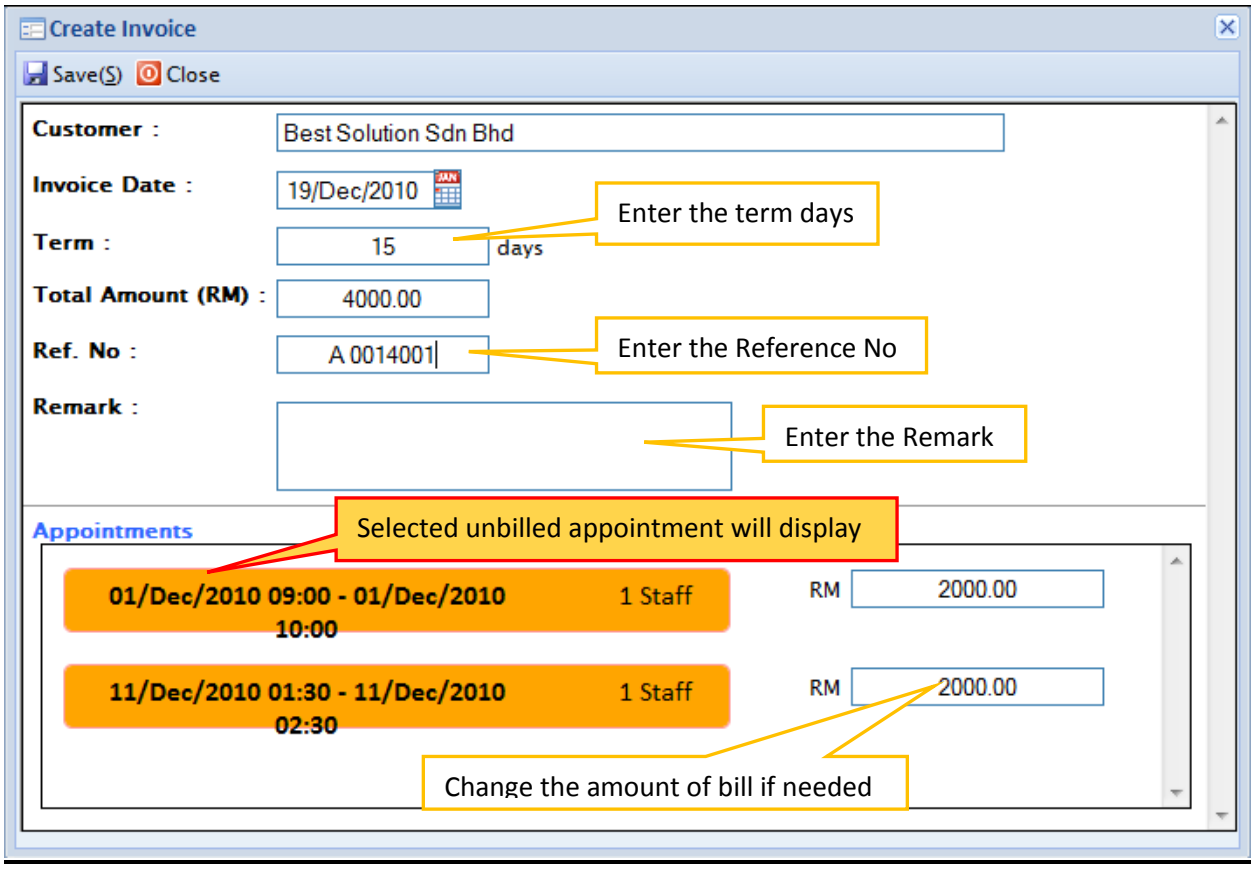

Figure 22b: Unbilled Appointment Page

7. If invoice created successfully, a pop-up box with “Invoice successfully created” message will be shown, refer to Figure 22c.

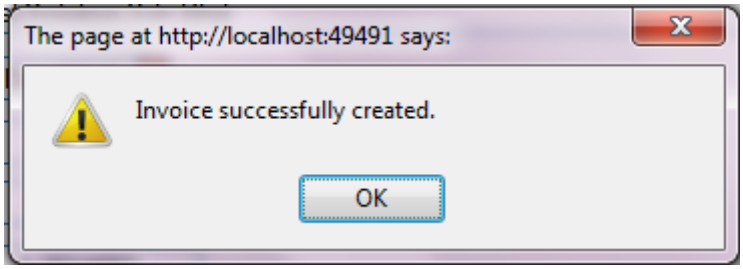

Figure 22c: Pop-Up Box

8. Invoice will be shown, refer to Figure 22d.
9. Invoice can be paid by clicking "**Pay Now**" button, refer to Figure 22d. The full process of payment will be explained further in Figure 23.
10. Invoice can be printed by clicking "**Print**".
11. Invoice can be closed by clicking "**Close**".

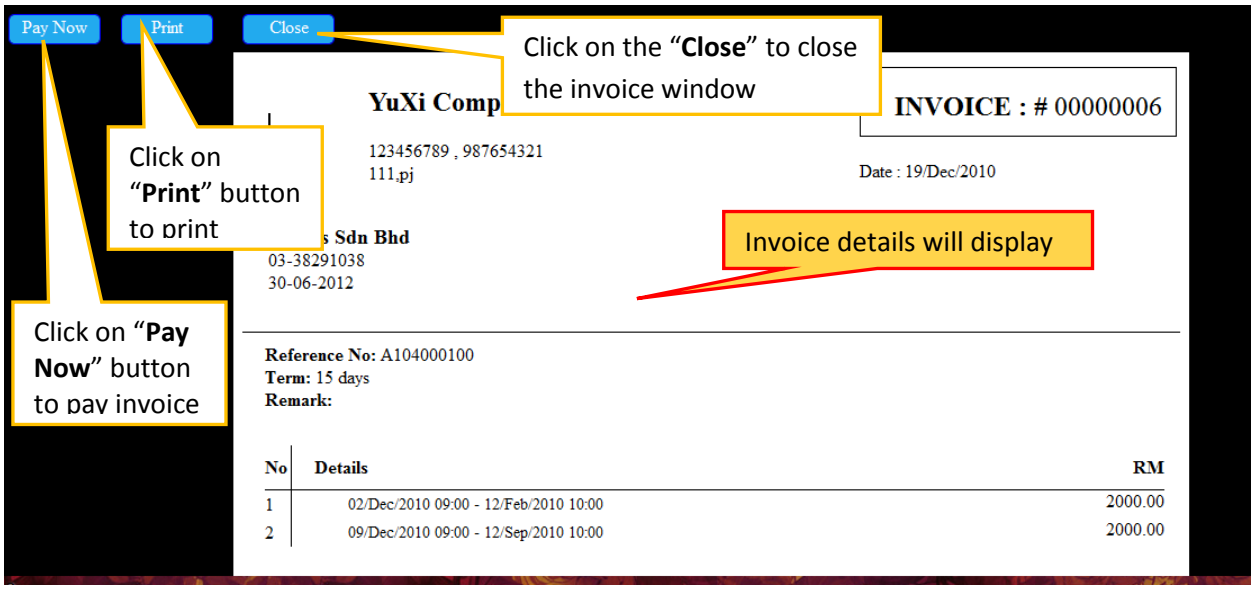

Figure 22d: Invoice

13.0 SHOW INVOICE

Description: Check the invoices of customers.

Step:

1. Click on "**Invoice**" tab, refer to Figure 23a.
2. Click on "**Invoice**" button to show the latest three months invoices of customers.
3. Click on the "**Show All Invoice**" to show all the invoices of the customer regardless invoice date, amount and invoice payment status.

Figure 23a: Invoice Page

4. Click on the "Show Unpaid Only" to display all the unpaid invoices of all customers, refer to Figure 23b.

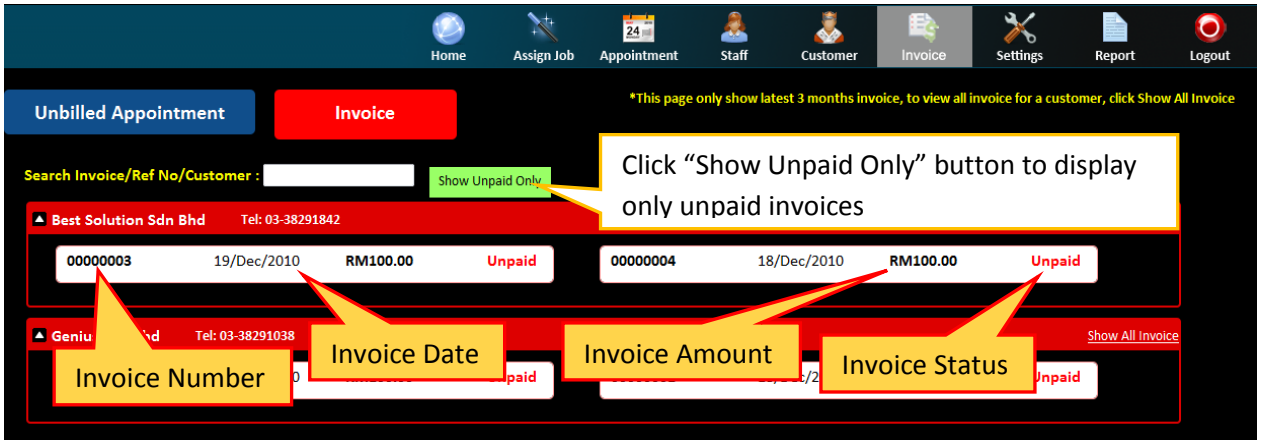

Figure 23b: Invoice Page

14.0 PAY INVOICE

Description: Change the invoice payment status when customer pays the invoice.

Step:

1. Click on invoice bar which customer want to pay, refer to Figure 24a.

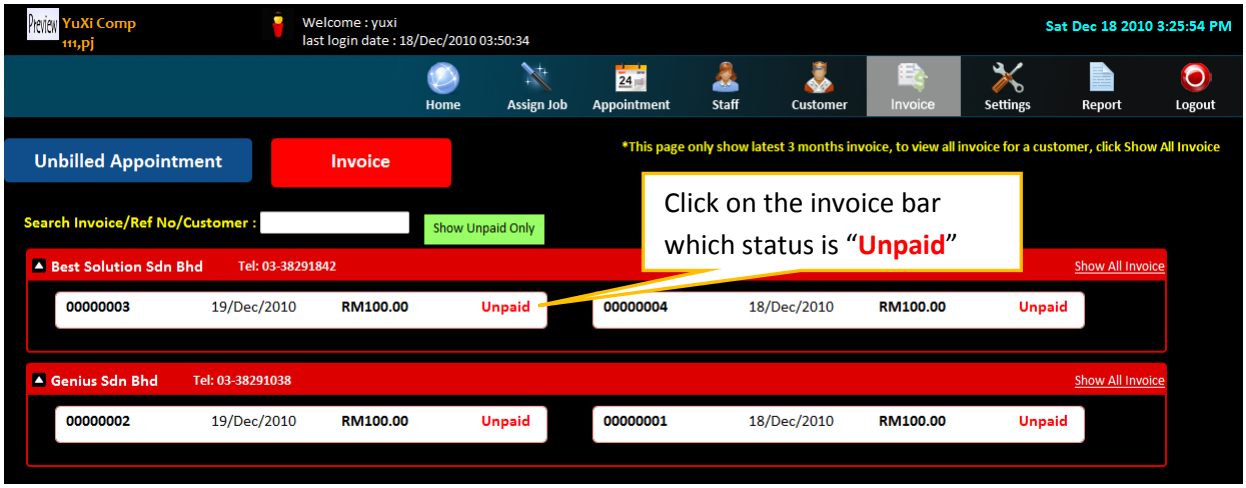

Figure 24: Pay Invoice

2. A pop-up invoice window will be displayed, refer to Figure 24b.

3. Click "**Pay**" button to pay the invoice.

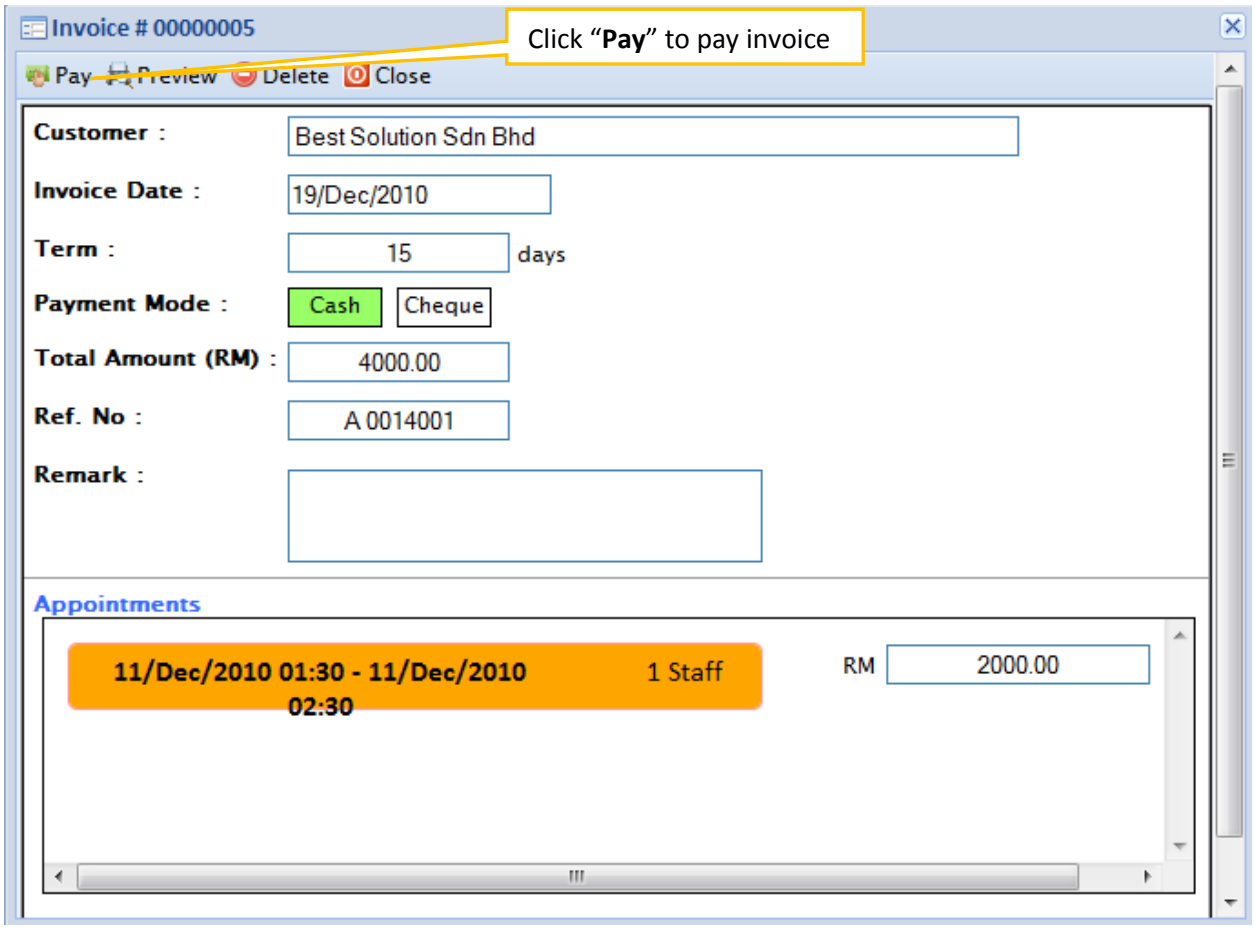

Figure 24b: Invoice Pop-Up Window

4. If the invoice is successfully paid, a pop-up window which indicates successful payment will be displayed, refer to Figure 24c.

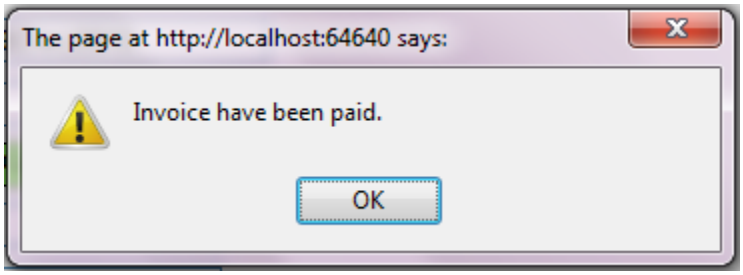

Figure 24c: Successful Invoice Payment Pop-Up Message

5. The receipt of the invoice will be displayed, refer to Figure 24d.

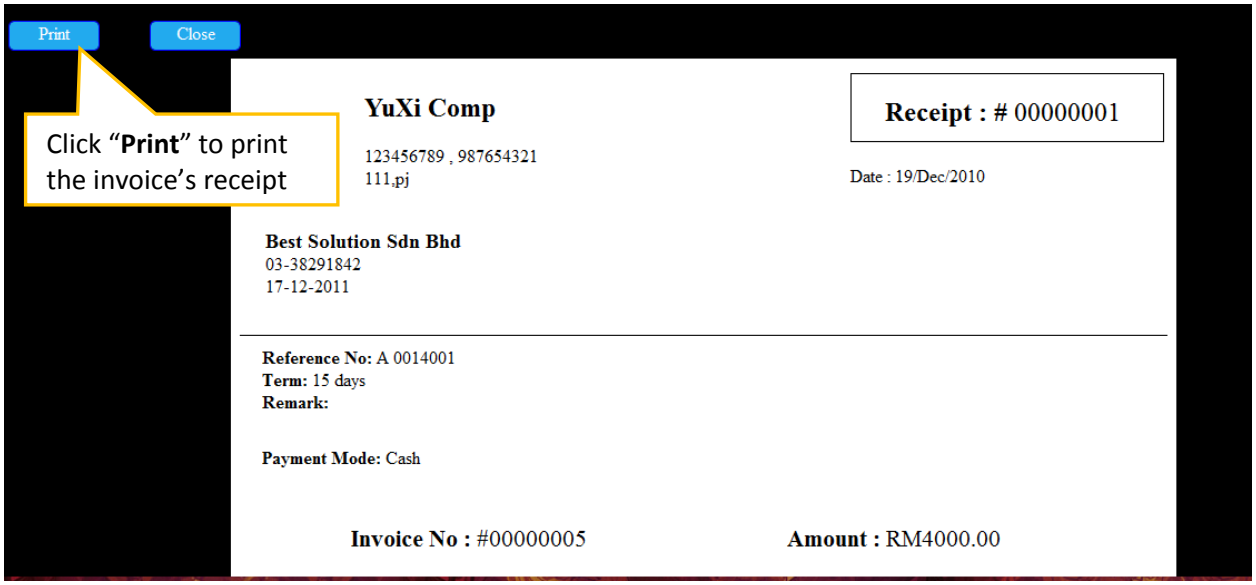

Figure 24d: Receipt of Paid Invoice

15.0 REPORT

Description: Summary of various business activities.

15.1 Report of Staff's Appointment

Description: Summary of appointments sorted by staff's name.

Step:

1. Click on "**Report**" tab and you will see the appointments' details will be shown, refer to Figure 25.
2. Select a date to view the appointments on the day and 6 days onwards, refer to Figure 25.
3. Print the report by clicking the printer icon, refer to Figure 25.

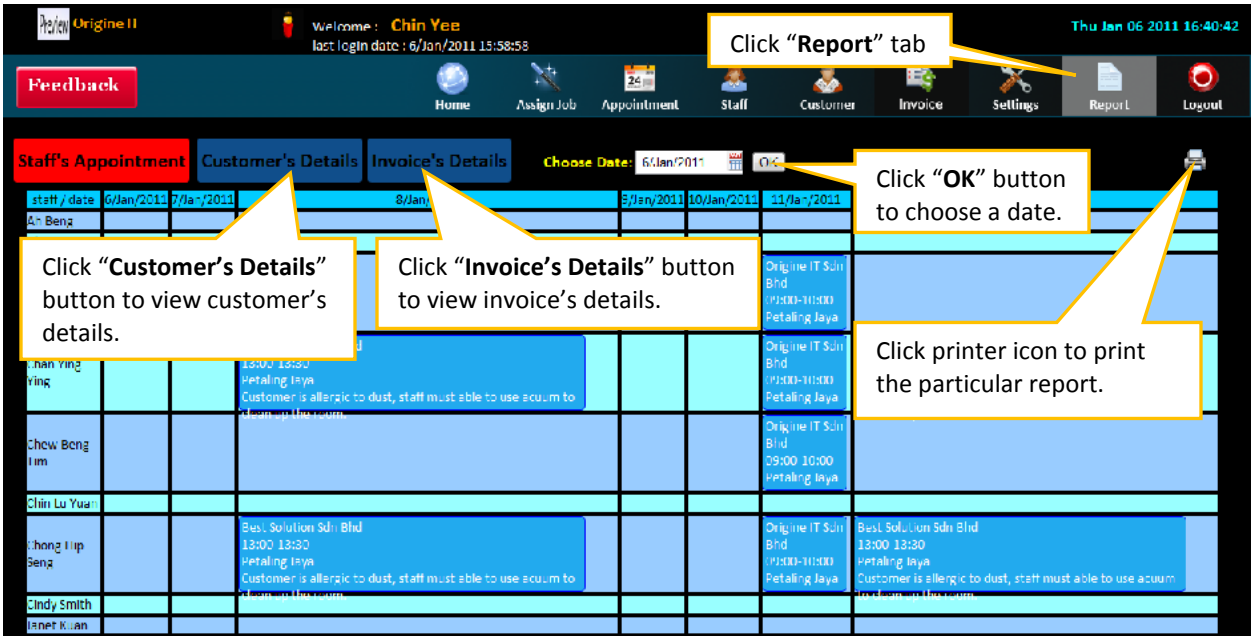

Figure 25: Report of Staffs' Appointments

15.2 Report of Customer's Details

Description: Summary of customers' details.

Step:

1. Click on "**Customer's Details**" button to display customers' details, refer to Figure 25.
2. Click to select a format which the report will be exported to, refer to Figure 26.

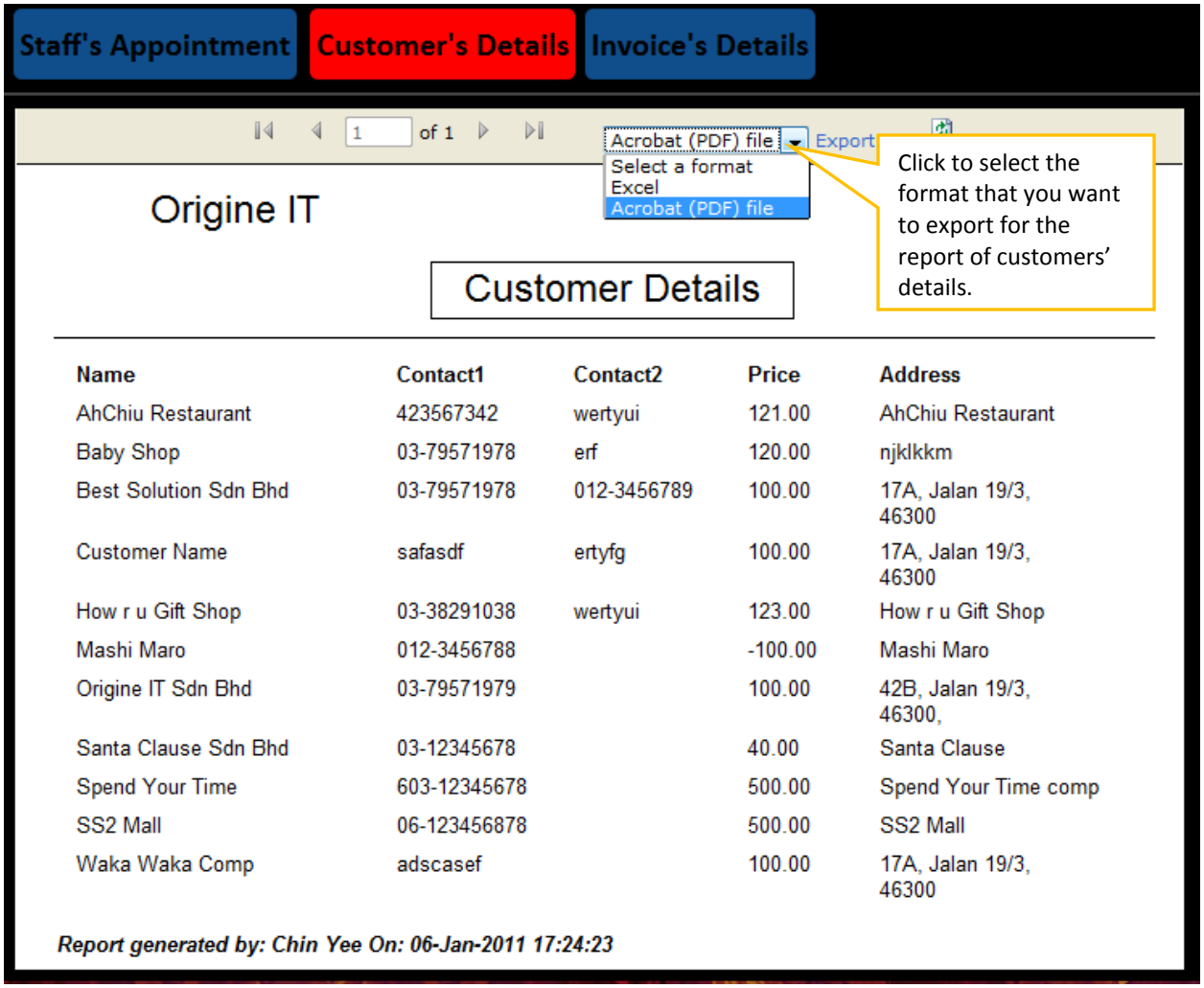

Figure 26: Report of Customers' Details

15.3 Report of Invoice's Details

Description: Summary of invoices' details.

15.3(a) Sales Report

Description: Summary of sales report.

Step:

1. Click on "**Invoice's Details**" button to display invoices' details, refer to Figure 25.
2. As soon as "**Invoice's Details**" button has been clicked, the page will direct to Sales Report.
3. Select Start Date, End Date and click "**Show**" button to display the sales within the selected period, refer to Figure 27.
4. Select the format of report which you want it to be exported and click "**Export**", refer to Figure 27.

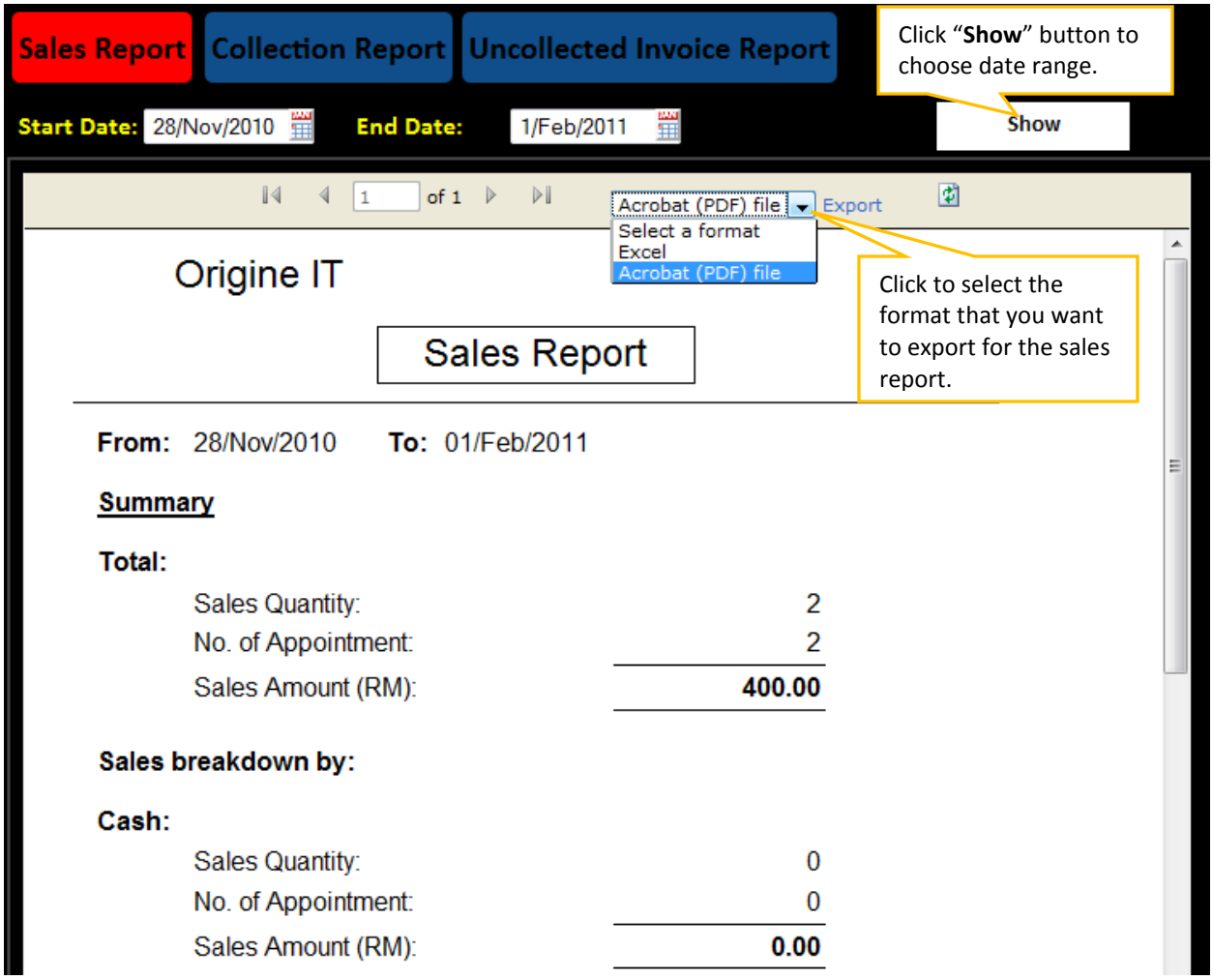

Figure 27: Sales Report

15.3(b) Collection Report

Description: Summary of collection which show the payments which had been collected from the customers.

Step:

1. Click on "**Invoice's Details**" button to display invoices' details, refer to Figure 25.
2. As soon as "**Invoice's Details**" button has been clicked, the page will direct to Sales Report.
3. Click on the "**Collection Report**" button to direct the page to "**Collection Report**" page.
4. Select Start Date, End Date and click "**Show**" button to display the collection within the selected period, refer to Figure 28.
5. Select the format of report which you want it to be exported and click "**Export**", refer to Figure 28.

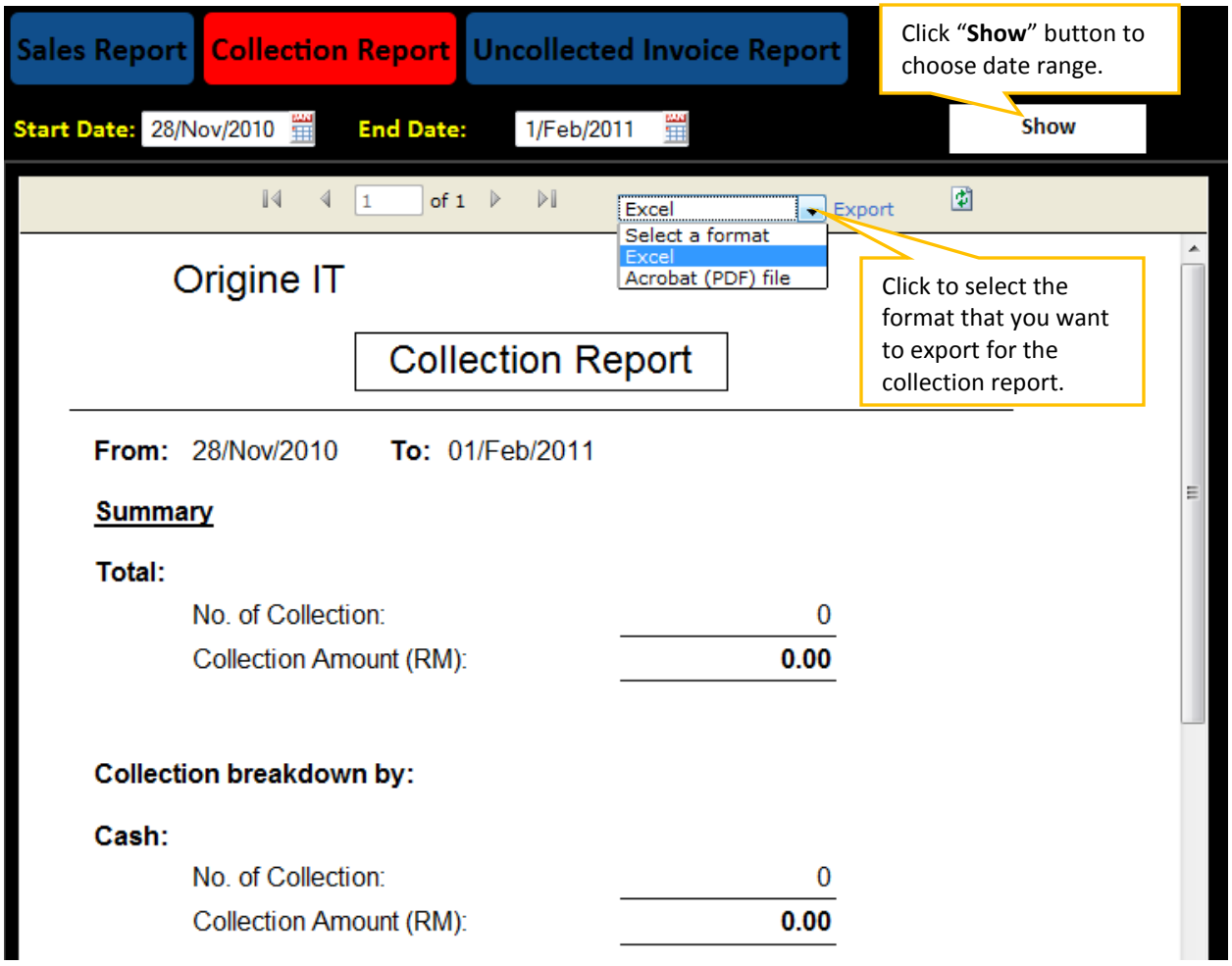

Figure 28: Collection Report

15.3(c) Uncollected Invoice Report

Description: Summary of uncollected invoice of the customers.

Step:

1. Click on "**Invoice's Details**" button to display invoices' details, refer to Figure 25.
2. As soon as "**Invoice's Details**" button has been clicked, the page will direct to Sales Report.
3. Click on the "**Uncollected Invoice Report**" button to direct the page to "**Uncollected Invoice Report**" page.
4. Select Start Date, End Date and click "**Show**" button to display uncollected invoice(s) within the selected period, refer to Figure 29.
5. Check "**Show All**" box to display all the uncollected invoice(s) within the selected period, refer to Figure 29.
6. Select the format of report which you want it to be exported and click "**Export**", refer to Figure 29.

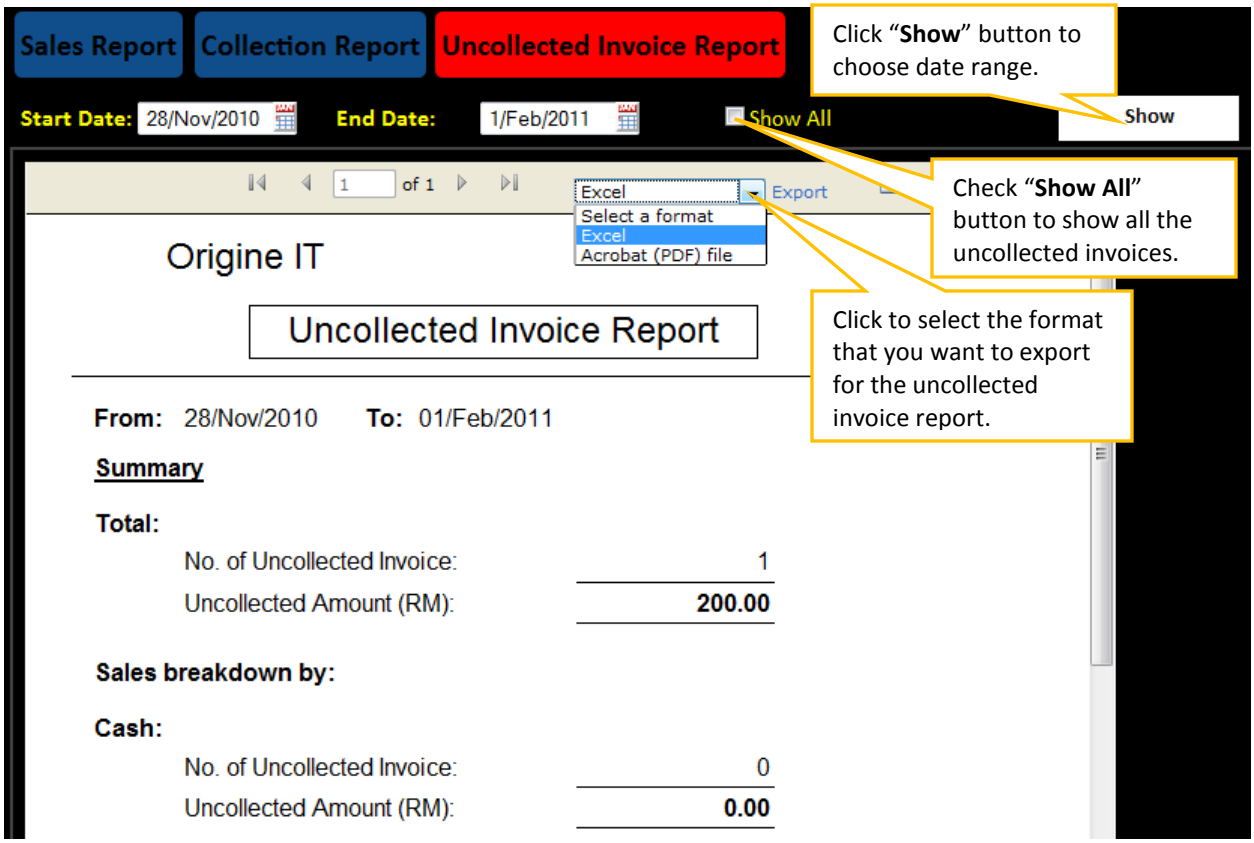

Figure 29: Uncollected Invoice Report

16.0 EDIT/UPDATE PROFILES

Description: Edit or update company profile and user profile.

16.1 EDIT/UPDATE COMPANY PROFILE

Description: Edit/Update company information in company profile.

Step:

1. Click on the company name which is next to the company photo at the upper left, refer to Figure 30.

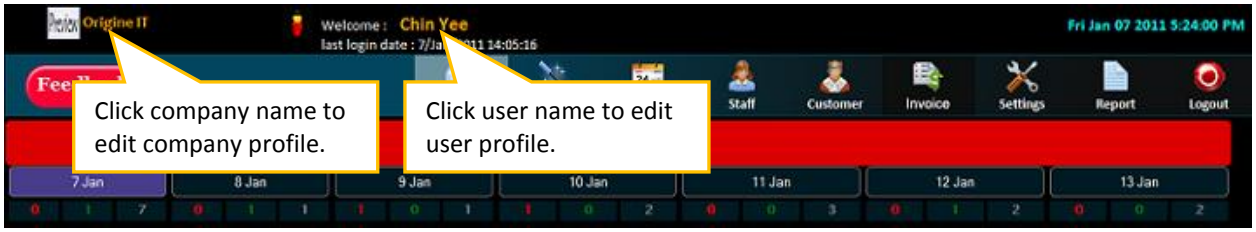

Figure 30: Dashboard

2. "**Company Profile**" window will pop-up, refer to Figure 31.
3. Edit the information which wanted to be updated.
4. To update business operation hour, click "**Edit business hour**" and select the start time and end time of your operation hour.
5. Click "√" to save the changes, refer to Figure 31.

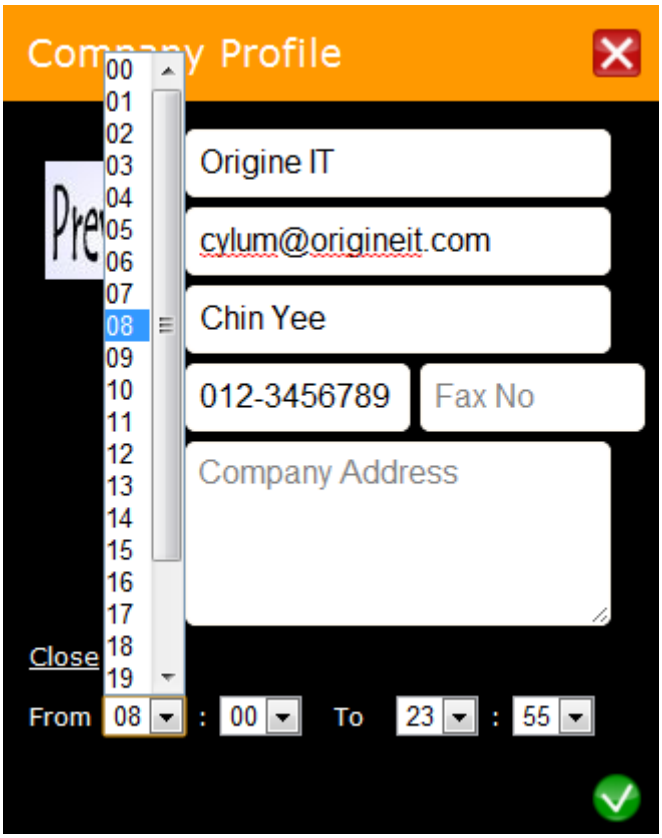

Figure 31: Company Profile Pop-Up Window

6. An updated successfully message will be shown, refer to Figure 32.

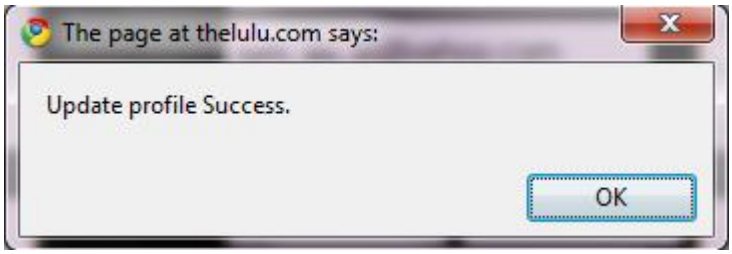

Figure 32: Company Profile Update Successfully Message

16.2 EDIT/UPDATE USER PROFILE

Description: Edit/Update user information in user profile.

Step:

1. Click on the user name or photo above the "**Home**" tab, refer to Figure 30.
2. Edit the information which wanted to be updated, refer to Figure 33.
3. Click "√" to save the changes, refer to Figure 33.

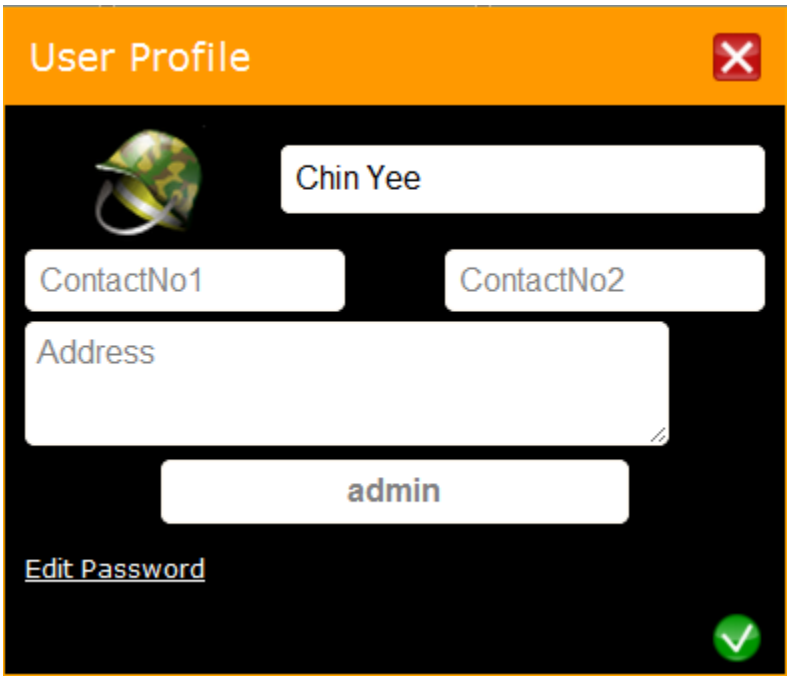

Figure 33: User Profile Pop-Up Window

4. An update successfully message will be shown, refer to Figure 34.

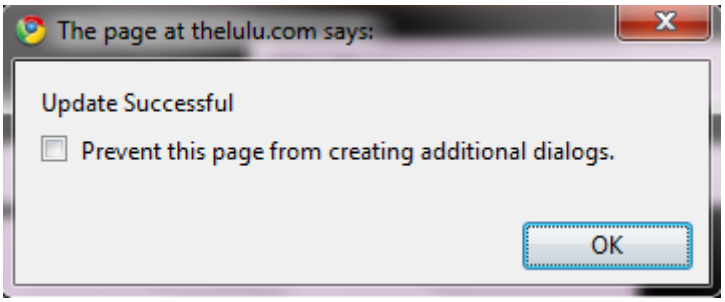

Figure 32: User Profile Update Successfully Message